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# Introducing our Financial Planning & Wealth Management Service

**ArmstrongWatson®**

Financial Planning & Wealth Management

[www.armstrongwatson.co.uk](http://www.armstrongwatson.co.uk)



*Helping our clients  
achieve prosperity,  
a secure future and  
peace of mind.*

## Welcome

Welcome to Armstrong Watson Financial Planning and Wealth Management.

We are the financial advisory division of the Armstrong Watson group which has been advising, supporting and protecting clients across the North of England and South West Scotland since 1867.

We have highly qualified, experienced advisors in each of our office locations in Cumbria, Northumberland, South Lakes, Yorkshire and Scotland.

We are proud to be a firm of Chartered Financial Planners and recognised by the Chartered Insurance Institute (CII) as an organisation that demonstrates significant commitment to an overall standard of excellence and professionalism.

This commitment to service and quality of advice has led us to now managing client wealth in excess of £800m.

## Our approach

Our approach is to step into our client's shoes and see their personal or business situation from their perspective, allowing us to have a clear understanding of their aspirations and objectives. This understanding helps us shape our advice and provide an effective, and most importantly, a personalised planning service to all our clients.

Knowledge of our clients' objectives helps us develop a clear financial strategy that can evolve with their changing circumstances. Reviews on an on-going basis allow us to accommodate changes and developments as required.

Being part of the Armstrong Watson group means that we have strength in numbers, enabling us to work alongside in-house accountants, business advisers and service specialists to ensure that our clients benefit from the expertise of trained professionals. We also work alongside our clients' existing professional advisors to ensure that they receive a co-ordinated approach.

*Helping our clients achieve prosperity, a secure future and peace of mind.*

*...we're with you.*

## Our advice process

No two people or businesses are the same. Whilst there may be some similarities, just like people, each situation is unique.

There is now an ever increasing range of financial solutions available and information can be accessed far more easily with just the touch of a button.

Of course, the challenge is how you identify what the right strategy is for you. This is where we can work with you to ensure that you have a plan focused on achieving your goals and aspirations.

Our Financial Planning Consultants can speak to you remotely by video as well as face to face. We also have a telephone based service for clients who prefer this method of communication.



## Our fees

The fees for an initial meeting will be covered with our compliments and at the end of this first meeting we will be in a good position to assess how well we have understood your needs and be very clear on how we are able to help you. You will also be aware of the work involved in addressing your objectives.

We operate on a no surprises philosophy, so prior to starting work we will agree our fees with you. In order to ensure that you only pay fees for the specific advice you want, we break our fees down to match the three phases of our advice process – strategy, implementation and ongoing review – so that you are aware from the outset what costs are involved.



### Dumfries

01387 955900

john.hunt@armstrongwatson.co.uk

### Carlisle

01228 690000

matthew.slessor@armstrongwatson.co.uk

stephen.shovlin@armstrongwatson.co.uk

marcus.dodds@armstrongwatson.co.uk

stuart.smith@armstrongwatson.co.uk

### Penrith

01768 222030

justin.rourke@armstrongwatson.co.uk

paul.moody@armstrongwatson.co.uk

### West Cumbria

01900 310440

stuart.smith@armstrongwatson.co.uk

### Kendal

01539 942030

chris.hill@armstrongwatson.co.uk

amanda.heyts@armstrongwatson.co.uk

david.squire@armstrongwatson.co.uk

### Glasgow

0141 233 0700

brian.mcnicol@armstrongwatson.co.uk

### Hexham

01434 375550

ryan.anderson@armstrongwatson.co.uk

### Newcastle

0191 434 0830

james.marlow@armstrongwatson.co.uk

### Northallerton

01609 702000

kerry.chaloner@armstrongwatson.co.uk

### Skipton

01756 620000

david.porter@armstrongwatson.co.uk

### Leeds

0113 221 1300

david.porter@armstrongwatson.co.uk

simon.mayoh@armstrongwatson.co.uk

martin.parnham@armstrongwatson.co.uk

james.marlow@armstrongwatson.co.uk

Call 0808 144 5575 to be put through to your local office

### Remote & Telephone advice:

Call 0113 221 1300 or alternatively email [ashley.mccartney@armstrongwatson.co.uk](mailto:ashley.mccartney@armstrongwatson.co.uk)

*Building trust through long term relationships, protecting individuals,  
their families and businesses*



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