Wealth Management

Whiting & Partners Wealth Management Limited believes that professional wealth management can add significant value to individuals and businesses. We pride ourselves in making the difficult decisions a little easier and our experience demonstrates that providing a comprehensive on-going client review service is integral to successful long term wealth management.

A Modern Approach with Traditional Values

www.whitingandpartnerswm.co.uk

Whiting & Partners
Wealth Management

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A focus on financial planning not products

We identify your objectives with you and the cash flow planning needed to ensure that you live the life you want to live, selecting the appropriate facilities or tax 'wrappers' to be used when needed.

Investment Portfolio Construction

We use modern scientific risk-profiling methodology as well as face-to-face discussion, to help you decide on the appropriate amount of risk you wish to take.

We then design a suitable asset allocation in line with this to meet your objectives.

We set up the most efficient method of accessing your asset allocations' market returns. This includes creating access to institutional pricing and strategies not normally available to private investors.

Advice on all aspects of financial planning

- Investments
- Retirement planning and pensions
- Savings
- Managing your cash
- Protection for you and your family
- Long term care
- Business protection/planning
- Trusts and charities
- Taxation and estate planning in conjunction with your trusted legal and accountancy advisers

Regular face-to-face meetings

- Six monthly or annual review meetings with your dedicated adviser
- Financial check-ups on your long-term cash flow planning
- A complete review of your financial planning strategy

Transparent fee based service

Fees, agreed in advance with our clients, cover work undertaken on their behalf. They are advice-based and not related to any product-providers' commission rates - a further demonstration of the independence of our advice.

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Chartered Financial Planners CII

Independent financial advice is provided to clients by Whiting & Partners Wealth Management Ltd, a majority owned subsidiary company of Whiting & Partners Chartered Accountants.

Whiting & Partners Wealth Management Ltd is authorised and regulated by The Financial Conduct Authority and is entered on the FCA register (www.fca.org.uk/register) under reference 435190.
The Financial Conduct Authority does not regulate Will Writing, Loans, Credit Cards, some forms of Mortgage, Tax Advice, Offshore Investments or Estate Planning.