

S&P
SMITH & PINCHING

The Name
You Can Trust

Personal Financial Planning



Financial Planning with *you* at heart

Financial Planning is more than simply helping you save, invest, or pick the right financial product. It's about understanding what is important to you, the life you would like to lead and being able to give you the peace of mind that you are not alone in making the big, the small, or the difficult decisions that life throws our way.

Our Financial Planners get to know each client well, and often work with several generations of the family from the first savings or mortgage through to retirement and later life planning. Trust is at the core of the relationship we have with our clients and we aim to make sure each and every one knows how valued and important they are to us.

Our service offering is unique, professional and strong, with a personal touch. We take our responsibilities very seriously, and do all we can to deliver the best service to every client. We constantly look at ways to improve and provide even more value for money to our clients.

We also work closely with professionals such as solicitors, accountants, business finance, and mortgage providers so that when our clients need help outside of our expertise, we can always find someone to help.

How can we help you?

Our range of services include:

- | | |
|------------------------|---|
| Retirement Planning: | • helping you achieve your future goals |
| Investment Planning | • managing your pensions and investments |
| Preserving your estate | • tax mitigation strategies |
| Later life lending | • accessing the value in your home |
| Mortgages | • lending for purchase, remortgage, buy to let, limited |
| Protection | company buy to lets, portfolio landlord |
| | • protecting you, your business and your family |

Our Process

Seeking financial advice can seem daunting, that is why we have a proven process that makes sure we get to truly know you and your needs.

We work together as a team to make sure we create a carefully crafted financial plan that represents what is important to you and give you strategies to achieve your life goals.



Getting to know you

Where do you want to go with your financial journey? Maybe you want to retire early or be mortgage-free as soon as possible. Our team can help you discover what is possible.



Bringing ideas together

Our team can help you explore the many areas that might be relevant for pulling a coherent plan together such as pensions, protection, mortgages and protection.



Building your personal financial plan

With the different ideas and possibilities now explored, we can start crafting the strategy to help you move efficiently towards your financial goals.



Keeping you on course

Once your plan is set in motion, our regular reviews help to monitor and to keep it on track – accounting for new situations in your life (or in the wider market).

We've been giving independent financial advice for over 50 years...

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With over £1.5bn of assets under our advice, we are one of the largest firms in the area and we are proud to be the first to be awarded the Chartered Financial Planners designation in 2009 by the Chartered Insurance Institute.

CONTACT

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