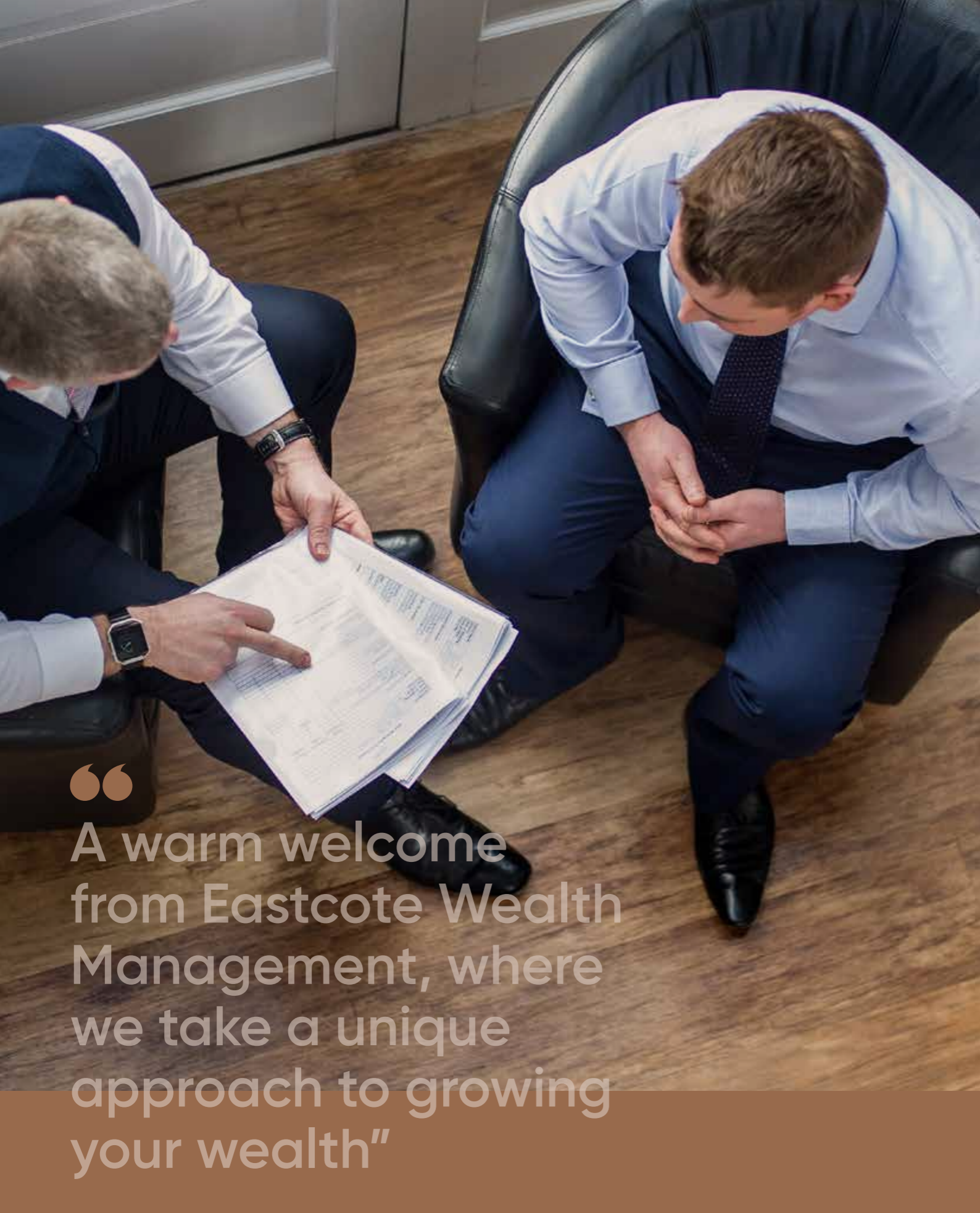




eastcote
WEALTH MANAGEMENT

CORPORATE SERVICES



“
A warm welcome
from Eastcote Wealth
Management, where
we take a unique
approach to growing
your wealth”

Welcome

Eastcote Wealth Management's mission is to provide the highest quality of financial planning advice to you, your business and your employees in a professional and caring manner.

A UNIQUE APPROACH

Our client-focused team is centred around providing a holistic, tailored and wide-ranging view of both you and your business's financial aspirations for your long-term benefit.

Our experienced team of corporate advisers are teamed with paraplanning and research specialists, expertly managing every aspect of your company's employee benefits and protection needs.

We can also work closely with your accountants and legal advisers, ensuring that you receive a seamless service.

As independent advisers with Chartered Financial Planner status, you'll benefit from the highest level of professional and unbiased advice on your company's employee benefits, shareholder protection and workforce pensions, as well as your own pension and investment planning.

This brochure outlines our approach, planning process and services for you, your business and your employees.

The Directors: Trevor Law, Rob Kenyon, David Fleet, Jonathan Hearn and John Ruddick

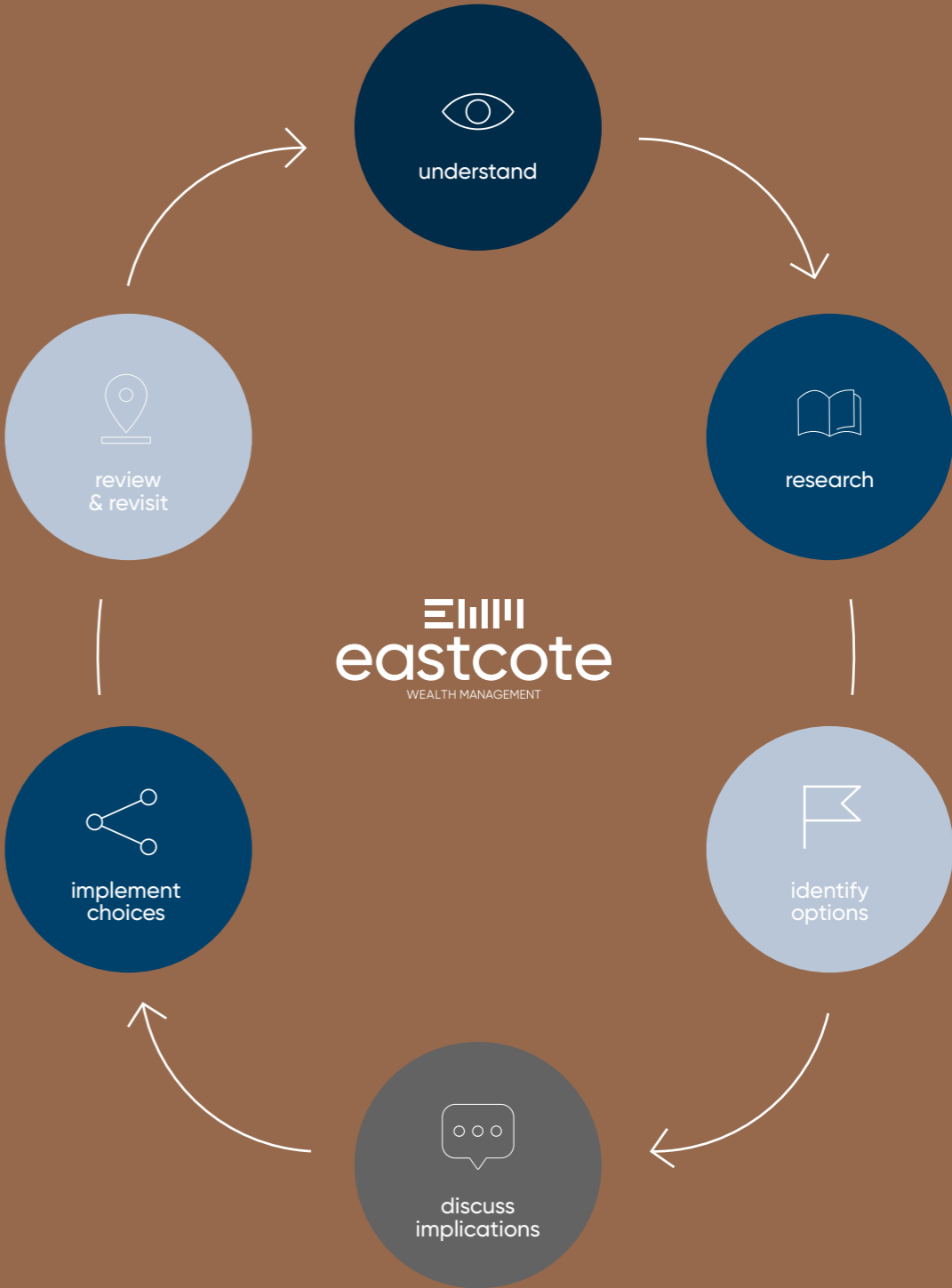
Corporate Financial Planning

At Eastcote Wealth Management, we will work with you to ensure that we have all of your relevant information at our fingertips. We will take the time to understand your individual, business's and employees' financial goals and aspirations.

Having established everything that affects your business, we will work alongside you and your team to provide a fully integrated solution.

We can provide information, workshops or presentations to your staff, to make sure that they are all fully aware of the options and benefits. In addition, we can provide annual reviews and even one to one meetings with your team to discuss their financial needs, adding value to the employee experience.

“
Our aim is to understand your business, its needs and to provide an excellent level of support.”





expert financial planning
for the bigger picture...

Directors' Pensions

As a business owner or company director, you'll be aware of the need to save for your own retirement and the importance of inheritance planning. A director's pension is one of the most tax efficient ways of doing this.

Through understanding your requirements and researching the market, we will identify the pension options available to you. You'll receive clear and concise information and guidance on self-invested personal pensions (SIPPs) and small self-administered schemes (SSASs), to identify your preferred arrangement.

Although independent, we also have excellent relationships with accountants and solicitors, so you have access to the professionals you need to realise your goals.



SHAREHOLDER PROTECTION

In order to ensure that your aspirations and goals for your business are realised in event of death, we can arrange shareholder protection insurance.

Shareholder protection insurance enables the surviving shareholder/s to buy the deceased shareholder's equity, giving the business a greater chance of long-term security. Eastcote Wealth Management can put a number of agreements and solutions in place to suit you and your business.

KEY-PERSON INSURANCE

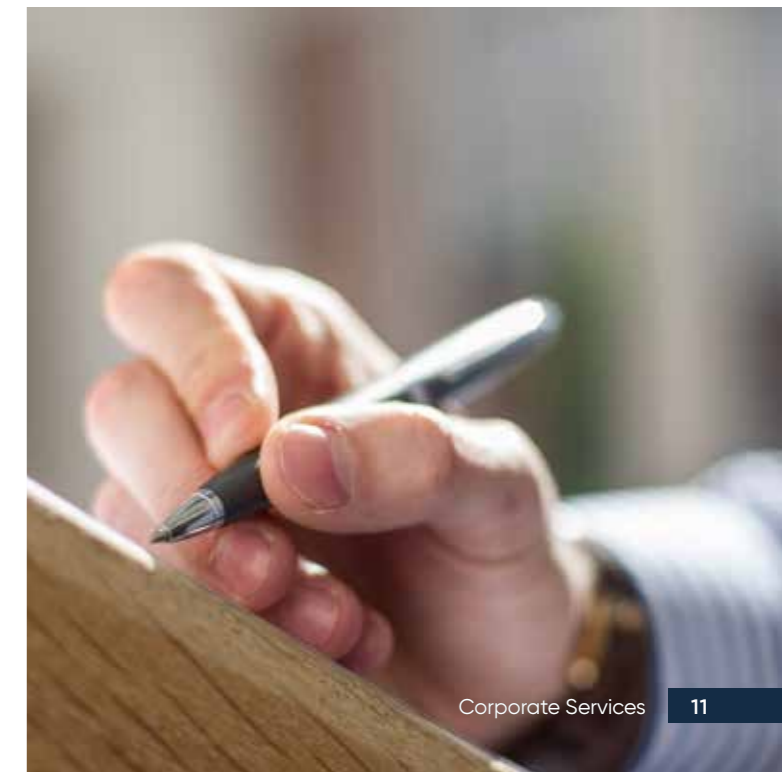
Key-person insurance provides a lump-sum payment should a vital person in the business die or become critically ill. It is a cost-effective insurance that can help with the cost associated with such a catastrophic event. This could include the costs of lost profits or finding a replacement, whether it is an employee or a director. The insurance has different benefits depending on the type of company.

Eastcote Wealth Management can work with you to provide the best policy for your needs.

BUSINESS PREMISES

Successful businesses often outgrow their existing premises and Eastcote Wealth Management can offer financial guidance if you're looking to expand or invest in a new commercial property.

We can help you to identify the most tax-efficient commercial mortgage deal to realise your aspirations.



Working with your team

A tailor-made company pension and employee benefits package can be a powerful tool in attracting and retaining quality staff. We will work hand-in-hand with your senior management and HR to ensure you have the right plans to meet your needs.

AUTO ENROLMENT

All employers are required by law to provide a qualifying workplace pension scheme and make contributions for certain employees. We will use our vast knowledge and experience of workplace pensions and the pensions market to help you to understand the rules. We'll aim to provide you and your employees with a tailored solution with minimal business disruption and full support.

The pensions regulator is the statutory regulator for workplace pensions. Auto enrolment is not regulated by the Financial Conduct Authority.

GROUP PENSION SCHEMES

Eastcote Wealth Management can set up a group pension scheme and communicate it as a benefit to the workforce. Group pension schemes offer tax efficiencies for employers, as contributions are tax deductible, they're also valuable for attracting and retaining the best talent in your business.

Eastcote Wealth Management aims to maximise your employees' investments to help them to realise retirement ambitions. We fully support your human resources team with one to one meetings, workshops, literature, presentations and support for your employees.

EMPLOYEE BENEFITS

In addition to addressing pension needs, providing further security and rewards through employee benefits adds considerable value to basic earnings. It can also be worthwhile both in building loyalty in your existing employees and attracting the best talent to your business.

EMPLOYEE BENEFITS OPTIONS

GROUP LIFE ASSURANCE

Includes death in service benefits – ensures dependants have security should the worst happen.

GROUP INCOME PROTECTION

Covers unavoidable absences from work due to sickness or injury.

HEALTH AND WELLBEING

Includes private medical insurance, dental treatment, prescriptions and travel insurance.

TOTAL REWARD STRATEGIES

These can be tailored to your employees and company's unique circumstances.



A Clearer Understanding

At Eastcote Wealth Management, we like to see financial success as a long-term plan. Our simple fee structures reflect the hard work and expertise of our wealth managers, which we put into constructing a lasting solution to meet your specific needs.

We also believe in being completely open and transparent about our fees. Eastcote Wealth Management will not proceed with any arrangements for you until we have explained and agreed our fees, in advance, and how you can pay them.

So, you'll understand the fees before you enter into any agreement, allowing you to make an informed decision on whether it's right for you.

FIND OUT MORE


Please get in touch if you would like some more information and would like to arrange an appointment.

We will take the time to understand you and your business's circumstances in detail and tailor a solution to meet your unique needs.

We look forward to helping you to plan a secure future for you, your business and your workforce.

CONTACT US

Call: 01675 446500
Email: info@eastcotewealth.co.uk
Visit: www.eastcotewealth.co.uk



“Our fee structures reflect the hard work and expertise of our wealth managers, which we put into constructing a lasting solution to meet your specific needs”



Eastcote Wealth Management Limited is authorised and regulated by the Financial Conduct Authority No. 739045.
Company Registered in England and Wales No. 09865585