SUCCESSION
SPORTS & ENTERTAINMENT

SUCCESSION SPORTS

Plan for the future, plan for success

At Succession Sports and Entertainment, our dedicated team of Wealth Planners and investment advice experts know how to help sports professionals plan for long-term financial freedom.

Wherever you are in your journey, we'll work with you to help you gain clarity on what's important to you, build your individual financial plan, and provide you with the ongoing peace of mind and confidence to live the life you want.

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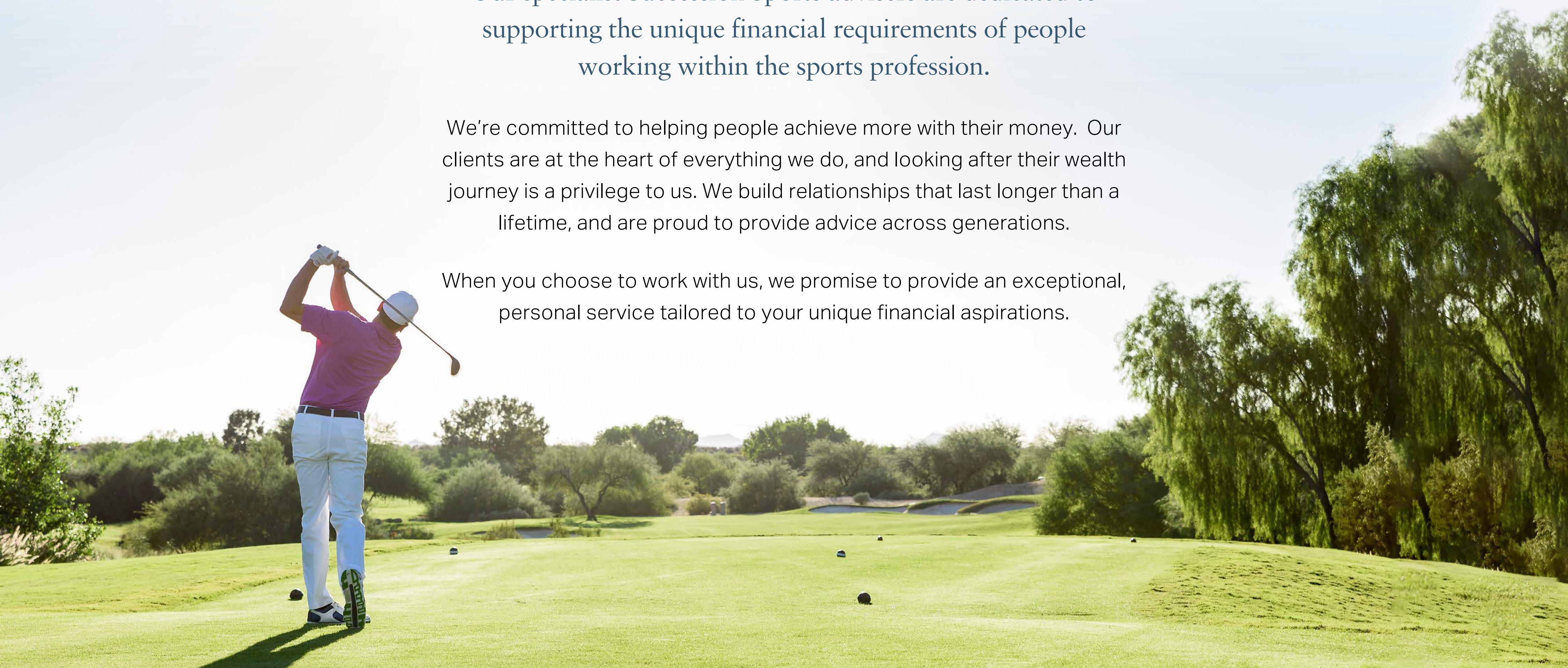
WELCOME TO SUCCESSION SPORTS AND ENTERTAINMENT

We are a large national UK financial advice firm. Our teams of Wealth Planners deliver high quality independent advice to thousands of clients across the UK.

Our specialist Succession Sports advisers are dedicated to supporting the unique financial requirements of people working within the sports profession.

We’re committed to helping people achieve more with their money. Our clients are at the heart of everything we do, and looking after their wealth journey is a privilege to us. We build relationships that last longer than a lifetime, and are proud to provide advice across generations.

When you choose to work with us, we promise to provide an exceptional, personal service tailored to your unique financial aspirations.



OUR WEALTH PLANNERS

At Succession Sports and Entertainment, we all work together and support each other. So, when you engage one of our Wealth Planners, you benefit from their expertise, and the collected skill and experience of our whole national network of colleagues as well.

Our team of Wealth Planners include Chartered Financial Planners, Certified Financial Planners and Fellows of the Personal Finance Society. As an Associate Firm of the Personal Finance Society, our Wealth Planners are committed to demonstrating ethical practice and high levels of professionalism at all times.

WHY CHOOSE US?

We recognise that you are unique. As an elite sportsperson you need to have an eye on the future from a very early age. The ever-present threat of injury, earning potential weighted at the front of your career, and the knowledge that there will come a time when you will need to build a life for yourself outside competitive sport means you need to plan for a whole host of different possibilities and opportunities.

Our role as Wealth Planners is to help develop that plan, avoid costly errors, and achieve financial wellbeing both now and after your retirement.

PROVIDING OUTSTANDING ADVICE

When your career is in full flight, it's easy to lose sight of what's ahead. With the assistance of cashflow modelling technology, we can illustrate how different choices under different scenarios could affect your future financial position. This can be a useful guide for discussing possible future outcomes in straightforward terms.

Many of our clients transition to lucrative careers in coaching, media, public speaking, and property ownership. Whatever you choose to do, we will help you build a plan that provides financial confidence for the future, and support you each step of the way.

DELIVERING EXCEPTIONAL SERVICE

We are proud of the long-lasting and close relationships we build with our clients, and the value that we add to their lives. In many cases, those relationships also extend to their families.

We know that for many clients, their parents or guardians play a vital part in their lives and their success. We also understand that if you are the parent or guardian of a professional sportsperson, you will want to know we are always working in their best interests.

CREATING FINANCIAL CONFIDENCE

Financial wellbeing can only be achieved when you have financial confidence. Our Wealth Planners are here to help you take control of your finances, and provide you with the confidence you need to go after what matters to you.

We are also accustomed to working closely with clients' other professional advisers. If you have your own specialist tax adviser, accountant or lawyer, we will happily work collaboratively with them.

INDEPENDENT AND TRUSTED ADVICE

We understand what our clients want from us: personalised planning, and easily accessible support from a trusted adviser whenever they need it. We are proud of the relationships we have built with chosen sports agencies over time. Our contacts with agencies refer us to their clients because they value and trust our high-quality advice, our exceptional client service and the peace of mind we provide. With our guidance, their clients can be confident their long-term financial security is being taken care of.

AN ASSOCIATE FIRM WITH THE PERSONAL FINANCE SOCIETY

The Personal Finance Society is responsible for leading the financial planning community towards higher levels of professionalism through technical knowledge, client service and ethical practice. As an Associate Firm, we are committed to its principles and ethics.

WHAT WE CAN DO FOR YOU

Our work typically starts at the very earliest stages of a client's career, working alongside other professionals and family members to ensure the right foundations are put in place. And it often continues long after you have left the professional field of play, as you work on new ambitions and goals.

We take a structured approach to creating a financial plan that's individually tailored to your current circumstances, which can be regularly reviewed and updated in line with your evolving aspirations for the future.

Our plans are designed to help give you the confidence and reassurance to live the life you want, while being flexible enough to keep pace with any changes you might face. We are proud of the relationships we have built with chosen sports agencies over time. A robust framework designed by our expert Investment Committee, our Investment Matrix helps us create solutions unavailable elsewhere, that are completely tailored to your needs. All the investment solutions we recommend are suggested based on understanding your personal investment goals. In the eventuality that we identify you have a need not satisfied by our matrix solution, we will review the whole of the market, as we will only ever recommend what is appropriate for you.

STEP 1: CLARITY

Our initial meeting with you is with no obligation on your part. We'll talk about your current situation, the things that matter to you, how we can help you, and our charging structure.

Then, if you're happy to, you will be given the opportunity to engage with us formally, which means that we can start planning for what you want to achieve with your wealth, and the next steps you might want to take. We'll also ask you to provide information on your income, expenditure and tax liabilities.

STEP 2: ANALYSIS

Your Wealth Planner and their team will consider your current financial arrangements, and assess whether they're working as well as they can for you. This could include savings, investments, borrowing, property, your Will and pensions.

STEP 3: PLAN

Your Wealth Planner will now present your personalised recommendations in a financial plan, which will provide you with clarity on your current financial position, a comprehensive overview of our recommendations, and a visual representation of your potential financial future (referred to as Cashflow).

STEP 4: ACTION

With your agreement, we'll implement the strategies recommended in your plan. Depending on your personal circumstances, this could be relatively straightforward, or it might involve a restructuring of your arrangements. Your Wealth Planner and their team will work together, to action any changes to support a smooth and timely process, and keep you up to date on progress at all stages.

STEP 5: CONFIDENCE

It's important that your financial plan grows with you, and responds to any changes in your life or the world around you, so that you can remain confident that you're on the right track. That's why we stay in regular contact with you, to review your current financial plan, and to ensure it continues to maximise all opportunities available to you. Our ongoing services are chargeable, and can be cancelled at any time.

Our Purpose, Vision and Values

Our Purpose

To make a meaningful and lasting impact on the lives of our clients and their families.

Our Values

Client-first.
The Foundation.

Do the right thing.
Deliver on promises and exceed client expectations.

Work as one team.
Win together with respect and decency – no egos.

Consider long-term legacy.
Decisions aligned to our ambition and vision.

Listen and act.
Our colleagues and partners actively engaged in the pursuit of our vision.

Our Vision

To be the **go-to partner** that individuals, families and institutions trust to help achieve their financial goals.

To be the **employer of choice** in the Wealth Management sector.

To drive **stable, profitable growth** for the business and the Aviva Group.

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If you have any questions, or are seeking more information, please don't hesitate to get in touch with us, via email at

sportsandentertainment@successionwealth.co.uk or by visiting **successionwealth.co.uk** or call us on **0800 051 4659**.

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