SUCCESSION WEALTH

Plan for the future, plan for success

At Succession Wealth, we know that the path to financial wellbeing is different for everyone. That's why we tailor our services around your needs, aspirations and dreams.

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 that you're on the right track.

CONTENTS

WELCOME TO SUCCESSION WEALTH

Succession Wealth Management Limited is a large national UK financial advice firm. Our teams of Wealth Planners deliver high quality independent advice to thousands of clients across the UK.

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 Wealth 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?

At Succession Wealth, we understand that you have your own priorities, needs, dreams and aspirations when it comes to your wealth. And we know that in a fast-changing world, security and peace of mind are priceless, and that financial wellbeing and independence are vital for you to have the confidence to live the life you desire.

Our clients rely on us to help them feel financially secure, confident and independent, and we strive to create relationships built on trust, so they feel that they're in safe hands. We regularly check that we're achieving this, and in our last survey 82% of our clients said they would be happy to recommend us to friends or family.

We believe that working together should begin with getting to know each other. Our initial meeting with you is with no obligation on your part. It's an opportunity for us to find out more about you and your aspirations, and for you to ask any questions you might have about the services we provide and what you expect from us.

PROVIDING OUTSTANDING ADVICE

Succession Wealth's founding aim was to build a financial planning firm that offered unrivalled expertise and advice. We're delighted to say our clients regularly tell us that's exactly what we provide for them.

DELIVERING EXCEPTIONAL SERVICE

We believe that looking after other people's wealth is a privilege that we never lose sight of. We treat your finances as you would yourself – with great care. It's an approach that has helped us create lasting relationships that span generations.

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.

JUST AROUND THE CORNER, NATIONWIDE

Our wealth planning teams are based across the UK. We understand what our clients want from us: personalised planning, and easily accessible support from a trusted adviser whenever they need it.

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

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 also being flexible enough to keep pace with any changes you might face. We are proudly independent, and our investment matrix reflects this. 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

Everything we do at Succession is guided by our Purpose, Vision and Values, all of which have been carefully considered and crafted to put the client at the heart of our business. We work as one team, working closely together so that our clients gain from our collective knowledge and expertise.

OUR PURPOSE

To build meaningful, lasting relationships with our clients and add value to their lives through our bespoke five-step financial planning process. By getting to know our clients, their goals and aspirations, we support their aims to realise financial confidence and independence.

OUR VISION

To be the trusted adviser of choice. We strive to create relationships built on trust, so our clients feel that they're in safe hands. To realise our vision, we consistently focus our efforts on delivering quality advice and an excellent client experience.

OUR VALUES

As we put our clients at the heart of everything we do, it's only right that we embed **CLIENT** into our values:

Client focus - we always act to support and benefit our clients.

Long term – our financial plans are built based on individual needs, but always aiming for long-term financial confidence for our clients.

Integrity - our work and decisions are always conducted with the utmost integrity.

Efficiency - we continuously evolve what we do with the aim of meeting, and exceeding, our clients' expectations.

Nimble - our strategic thinking, processes and leadership are nimble and effective to the benefit of our clients.

Teamwork - we believe that working together across our talented team, enables us to deliver quality advice backed up by an excellent client experience.

SUCCESSION WEALTH

successionwealth.co.uk

If you have any questions, or are seeking more information, please don't hesitate to get in touch with us, via email at **hello@successionwealth.co.uk**, by visiting **successionwealth.co.uk** or call us on **0800 051 4659**