SUCCESSION
SPORTS &
ENTERTAINMENT

SUCCESSION ENTERTAINMENT

Plan for the future, plan for success

At Succession Sports and Entertainment, we know how to help entertainment and media professionals achieve long-term financial freedom. While you're in the spotlight, you can trust us to take care of things behind the scenes.

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.

CONTENTS

WELCOME TO SUCCESSION SPORTS AND ENTERTAINMENT

Succession Sports and Entertainment is a specialist division within Succession Wealth Management Limited, which is a large national 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

Our dedicated team of specialised Wealth Planners and investment advice experts are highly experienced in working with professionals within the entertainment and media industry.

Our focus is on helping you plan to achieve financial independence and the life you want to live, through a carefully tailored service to suit your individual needs. 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 understand that being in the entertainment and media industry means you might come across extraordinary challenges during your career or have to deal with unpredictable income streams due to the project-style nature of work you may experience, and your career could change direction. This can require special planning to enable you to meet your financial responsibilities.

As an entertainment or media professional, you may not have the time to think about finances, and for that reason our role as Wealth Planners is to help you plan for your future, to avoid costly errors, and achieve financial wellbeing both now and after your retirement. Your Wealth Planner will help you address any challenges you may face, which will allow you to maintain your focus on what truly matters to you: your family, career, and your incredible talents.

PROVIDING OUTSTANDING ADVICE

At Succession Sports and Entertainment, we specialise in the unique financial requirements of those working within the entertainment and media professions, and our main objective is to help you keep an eye on your future, to ensure that you make the most of your money, to plan to achieve financial independence later in life.

DELIVERING EXCEPTIONAL SERVICE

We are proud to work with many high-profile entertainment and media professionals and their families. We understand that you will need discretion and are probably spending your time focusing on your career rather than the detail of your financial situation, which is potentially complex.

The close relationships we build, are the result of the time we invest in getting to know you, your concerns, what matters to you and what you want to achieve.

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.

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

You're part of a very unique industry, with its own characteristics, earning profile and variable career span, which can be unpredictable at times.

Your Wealth Planner will work closely with you, to create a plan and an investment strategy bespoke to you and your individual financial needs. The plan will take into account your income and contracts, alongside any pay reviews, bonuses, and royalties you receive throughout your career, to make sure that your finances are structured as tax-efficiently as possible.

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 proudly offer independent advice, and this is reflected in our Investment Matrix. 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

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
SPORTS & ENTERTAINMENT

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**

FP2024-344 Last updated August 2024