Independent Financial Advice

Your future is our present

‘Someone is sitting in the shade today because someone planted a tree a long time ago’.

About Georgetown Wealth Management

We believe that without a plan, life’s key milestones will just be a wish. Whether you are saving for a home, a wedding, your child’s education, starting a family, or thinking about retiring - good financial planning can help turn your goals to reality. Whether you are looking to build, grow or preserve your wealth, we listen to you and help you along the way.

Our solutions begin with you. Whatever stage of life or business you are in, we believe that a personalised financial plan built around you and your vision will support your life’s journey and help steer you well towards your goals.

As a team, we have over 90 years’ of financial services and wealth management experience. We are also a family business and therefore, not only are we able to offer exceptional financial planning and wealth management advice, but we also understand the challenges and growth aspirations of SME / family businesses.

We work with families, businesses, and private clients across the country with offices in Glasgow and London.

Our Services

Independence without compromise

We provide independent financial advice and have our own carefully researched investment solutions to suit each client, which are reviewed on a regular basis. These take full account of your own personal circumstances and attitude towards risk.

With this expert guidance, we can help you protect and grow your assets.

Strategic Financial Planning for your future

We are specialists in financial planning and wealth management helping to create the lifestyle and future that you want. Nobody can foresee the future, however, with our help creating your financial plan, you can rest assured that you will be much better prepared for life's uncertainties whilst ensuring that your loved ones are looked after.

Pensions

- Consolidations and review
- Retirement options
- Auto-enrolment
- Occupational pensions
- SIPP's
- Personal Pensions

Savings & Investments

- ISAs
- Investment Bonds
- General Investment Accounts
- OEICS
- Unit Trusts

Personal Protection

- Life insurance
- Critical illness cover
- Income protection
- Private medical cover
- Estate Planning

Cash-flow Modelling

- Income forecasts
- Mortgage repayments
- Education fees
- 'Big-ticket' expenses

Business Protection

- Staff health /life cover
- Shareholder cover
- Key person cover
- Income protection

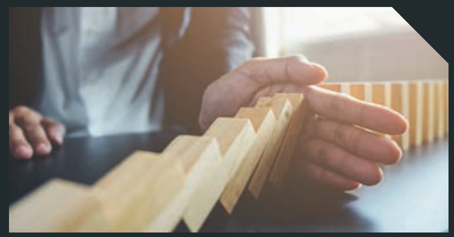
Retirement Planning

When thinking about retirement, it is never too late to get started. We understand that everyone will have different feelings and aspirations towards retirement and that is what makes it exciting. However, the common goal will be the same; to ensure that you have enough money for the life that you want when retirement comes. Upon approaching retirement, you may have several different pension plans you have paid into throughout your working career. We can help ease the hassle for you and advise you on how to structure your plans to help address your capital and income requirements from your retirement date onwards.

Talk to us now about your retirement dreams and lets start putting your plan in place.

Investment Planning

When it comes to investing, it is vital to have professional, reliable wealth management advice to help you achieve your financial goals. Working with you, we will put a plan together taking account of your end goals and attitude to risk along the way.



Protection Planning

In a world where we are quick to insure our home, valuables, and our pets, many of us forget to insure the most important things; ourselves, our loved ones and our income. Talk to us about taking simple steps to set up your personal protection plan and start protecting those things most important to you.

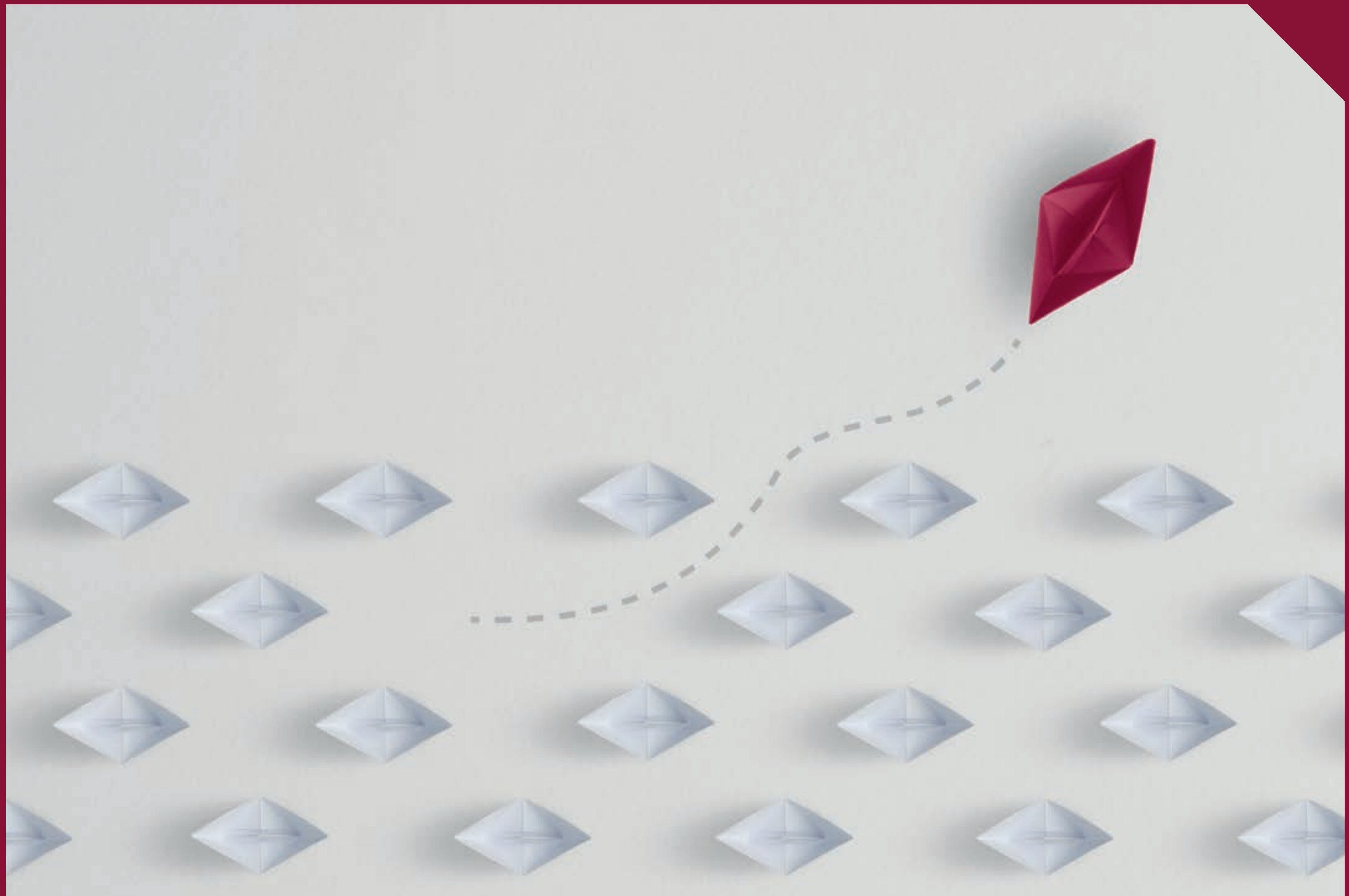
Advice for Business Owners

Corporate Services

When it comes to running your business, we know that it can feel like there is not enough time in the day. With the help of a financial adviser and thorough planning, we can help you and your employees build a plan for financial security. As your business grows and becomes more complex, we can evolve and flex your plan as your circumstances change.

Access to other Professional Services Providers

Your circumstances may require the help of other Professional Services advisers such as lawyers, accountants, or estate agents. We appreciate that your time is precious and so, we can put you in touch with other experts at your convenience to fit your individual needs and preferences. Just ask us about this service.



What makes us different?

In a highly regulated and complicated financial world, we believe in making things simple and straight forward for you. We take away any worries you might have in respect of your financial goals and get started on planning for your future.

We also believe in building lasting relationships with our clients and place this at the heart of everything we do.

That is why 100% of our new clients choose us because of the recommendation of an existing client. We are proud of this statistic and think it is testament to the way we work with our clients and the quality and success of our advice.

Our Values

Ensuring that we add value to you and your financial plan, whatever changes in life and business that you face is important to us. We have a set of values that will help us thrive internally with our talented team and externally with you, our clients.

> “Our values are what sets us apart from the rest.”

A people business

We are a family business - we work with individuals, SMEs and other family businesses.

We encourage ongoing development and training for all our staff and invest in our own people. This means that we can continually add value to our clients.

Personable

We are a friendly and personable team. We like to listen to you so that we have a deep understanding of your story, dreams, and ambitions. We care about our relationships with our clients, and how we deliver a quality service - we think that matters a lot.

Seeing life through your lens

We work with you to bring bespoke solutions to help grow, manage or preserve your wealth. We enjoy seeing things from your perspective – life through a different lens – to fully understand your circumstances and life's goals.

How We Work Together With You

Building a relationship that lasts

We will meet you to understand what stage you are in your life. We can then devise a clear plan that is personalised to your unique circumstances, and we work with you throughout the plan, to help you achieve your lifestyle and financial ambitions.

We will meet you at least annually to conduct a full review of any plans that we have put in place for you.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
The first thing we do is meet with you and listen	Understanding your financial and lifestyle goals	Uncovering the most suitable solutions for you	Creating your financial plan	Working together to achieve your plan	Regular reviews and updates

We would welcome a discussion with you about your future financial plans. You can contact our team for a no obligation first meeting to see how we can help you.

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