

How to benefit from financial planning

STREETSTM
FINANCIAL CONSULTING PLC



Our consultative and strategic approach to financial planning means you are free to spend time on the things you want to.

We are here to help

In so many ways:

- We can help you with quite specific needs such as reviewing your pension arrangements or discussing a range of inheritance tax issues.
- If you need a broader review of your overall financial situation we are well placed to advise on that too.

We pride ourselves on making your financial plan simple, straightforward and tailored to your circumstances.

Understanding you and your goals

You probably have investments, even if you don't think of them in that way; pensions, life insurance policies, property...

But do you have a clear plan for them? What are they for? Are they enough? What is enough? Is it just you they need to look after or two to three generations of your family?

Will you at some point need to decide about:

- education - primary, secondary or tertiary
- when and how to take pensions
- how to generate other income
- care homes and nursing care

How we work with you

In a nutshell: the answer is, however you want us to.

But because you probably want some ideas of how we would actually go about it, here are a few pointers:

One of our financial planners spends time with you to:

- Understand exactly what you are trying to achieve in the medium and longer term - simply by asking some straightforward questions - it's not rocket science but so often we all put off these kinds of conversations.
- Discuss the options and agree the appropriate solution to meet your needs - that can include investing or saving; or it can simply be a review of products and maybe a consolidation of some of them.

And as time goes by, we keep refining that solution with you as your situation and needs evolve and as the world around you changes.

Co-ordinating for you



How we work with you

- A tailored approach to meeting your needs, using our financial expertise.
- An appropriate level of service (how much of the administrative burden do you want to retain, how much do you want us to do?)
- The best use of the available technology to manage your affairs in one place and keep you up to date on them.
- All costed clearly and transparently.

Our approach provides control and confidence

A greater sense of being in control of your situation because you have planned it, not just left it all to chance.

Confidence - you have actually made a plan to reach your goals not just been left adrift in a sea of 'product' sales.

About us

Streets Financial Consulting plc is the independent financial planning arm of Streets Chartered Accountants, a **top 40 UK accountancy and tax practice** founded in 1907. For over 30 years we have provided financial planning services to clients from across our regional offices. We work closely with our accountancy and tax colleagues to provide our clients with a broad spectrum of advice, including:

- Investment planning for individuals, trusts, companies and pension schemes
- Retirement planning for individuals and corporate clients
- Options at retirement
- Inheritance tax mitigation and estate planning
- Family and corporate protection planning
- Tax planning strategies



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