WEALTH PLANNING

STONEHAGE FLEMING

NOW AND FOR FUTURE GENERATIONS

UK WEALTH ADVISORY

We are the UK Wealth Advisory business of Stonehage Fleming, working with aspiring and wealthy clients to develop and implement strategies to protect and manage their wealth.

Our clients include those who consider their affairs to be straightforward as well as those with the most complex needs. The breadth and depth of our technical expertise allows us to advise UK residents, domiciled and non-domiciled, as well as arrivers and leavers in support of UK-based assets.

We have extensive experience of working with wealthy clients and through our team based approach apply this practical wisdom for all our clients' benefit.

We are strategists and technicians in one

The combination of a structured process and personal delivery gives our clients peace of mind. The confidence that they have a clear plan and the knowledge that things will get done.

WHAT DIFFERENTIATES US IS OUR STRATEGIC APPROACH

We understand that wealth means different things to different people even within a family. We dedicate the time to understand what it means to you.

A Wealth Strategy starts by setting out your objectives – what you are really trying to achieve for yourself, for your family and for others. This provides the strong foundation for all the advice we give.

We are authorised in the UK to provide regulated advice across investments, pensions and insurance. As an 'independent firm' within Stonehage Fleming, we have the flexibility to recommend products and investments from the third-party marketplace to align with your unique financial objectives as well as offering access to Stonehage Fleming's wider services.

Whether you engage with us for advice on a specific area or in respect of your total wealth, we will follow a structured process.

A STRUCTURED PROCESS

1. Understanding objectives
We devote time and energy to this phase as experience has shown us how important it is. Objectives are often not easy to articulate. We share the practical wisdom that comes from years of working with similar clients. We are not afraid to challenge.

2. Developing the strategy
Our multi-disciplinary team covers all areas of UK wealth advice with specialists on-hand. We aim to keep things simple and explain it clearly. Clients rarely ask for more complexity. We use technology to help clients visualise their financial future and to build understanding of risks and opportunities.

3. Executing the strategy
We will recommend and implement specific products or structures. As appropriate, we co-ordinate in-house specialists and relevant external advisers. We are independent. We leverage our network for your benefit.

4. Ongoing monitoring
No plan is carved in stone. It must remain fluid to cope with changes in circumstances as well as legislation and market developments. Your dedicated client team will ensure you are kept up to date in a way and at a frequency that suits you.

A PERSONAL APPROACH

We tailor our delivery to each client's individual circumstances. We are focused on keeping things simple, doing what is necessary and what adds value in meeting a clear objective.

Every client has a dedicated adviser who looks after 20-40 families depending on complexity.

Through our team based approach, that adviser has access to an unrivalled breadth and depth of technical expertise and practical experience.

We act as a sounding board for our clients: providing advice and guidance for the moments that matter: marriage, divorce, job changes, starting and selling businesses, births and bereavement.

OUR CORE SERVICES

Clients engage with us for a specific area of advice or in respect of their total wealth.

Our full range of services supports clients at all stages of their life, addressing their needs as they arise and working closely with future generations. Services can range from junior ISAs for younger family members, through pensions and retirement planning, to more complex advice around charitable structures or private equity interests.

We offer a range of investment solutions leveraging the expertise of Stonehage Fleming, an investment business with £18bn under management.

As part of the wider Group, we can access for our clients

- legal & specialist tax advice
- bespoke discretionary investment management
- family office services
- family succession & governance
- corporate advisory
- trust & fiduciary

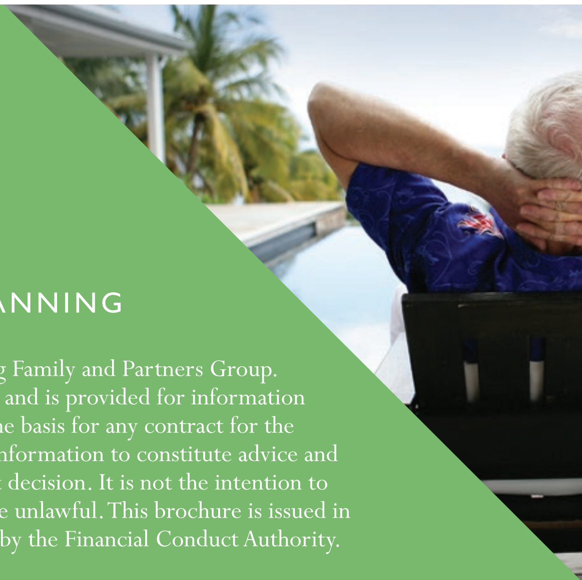
An unrivalled combination of practical experience
A sounding board for clients at the moments that matter
Strategists and technicians in one

CONTACT US

There is no substitution for a personal conversation.
If you are interested in hearing more, then please do get in touch.

enquiries@stonehagefleming.com

STONEHAGEFLEMING.COM/WEALTH-PLANNING



Stonehage Fleming denotes that a company is a member of the Stonehage Fleming Family and Partners Group. The information in this service guide does not constitute an offer or a solicitation and is provided for information purposes only to describe the services offered by Stonehage Fleming and not as the basis for any contract for the purchase or sale of any investment product or service. We do not intend for this information to constitute advice and it should not be relied on as such to enter into a transaction or for any investment decision. It is not the intention to promote or make our services available in any territories where to do so would be unlawful. This brochure is issued in the UK by Stonehage Fleming Wealth Planning who are authorised and regulated by the Financial Conduct Authority.

© Stonehage Fleming Wealth Planning Limited 2024
Printed on FSC and PEFC accredited material
Be Carbon Neutral