

Prosperity Pathway

Once the initial advice process has been completed and your immediate financial plans have been agreed and implemented, you will then begin to benefit from our on-going advice service, the Prosperity Pathway. We'll continue to work with you over the following months and years to help you achieve your financial goals, even as these change.

Features of the Prosperity Pathway include:



Regular face-to-face meetings

With your adviser to stay up to date with your aims and any changes that may occur. These can take place annually or more frequently if required.



Retirement planning

And pension forecasts to help you plan for your future.



Investment planning

Based on your financial goals, reviewing what types of savings and investments could help you to achieve them.



Tax planning

Your adviser will ensure that you are utilising any available allowances and investing in the most tax efficient manner



Unrestricted access

To your adviser and our administrative support team, whether that's by phone or email.



Cashflow modelling

We assess whether or not your pensions and investments are on course to meet your objectives.



Cash management service

We find the best available bank and building society rates for your deposits.



Behavioural coaching

We coach investors to remain disciplined in times of heightened uncertainty. We'll support investors to stay calm in turbulent markets and avoid common pitfalls such as trying to time the markets and chasing performance.



Spending strategy

Your adviser will ensure that any withdrawals made are as tax efficient as possible.



Estate planning

With support from our trusted professional partners including accountants and solicitors. We can structure your finances in order to reduce or eliminate any future Inheritance Tax liability, whilst ensuring that your standard of living is not jeopardised in the process.



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