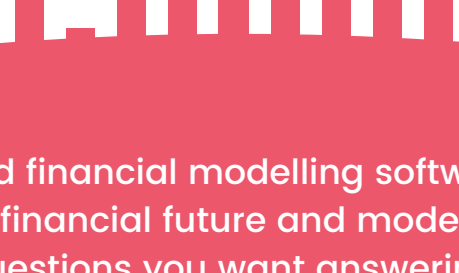




# Your Financial Plan

We all have goals and dreams of where we and our families want to be. But how do you ensure that these ambitions are fulfilled and they don't pass you by?



With our advanced financial modelling software we are able to build out your financial future and model the important questions you want answering.



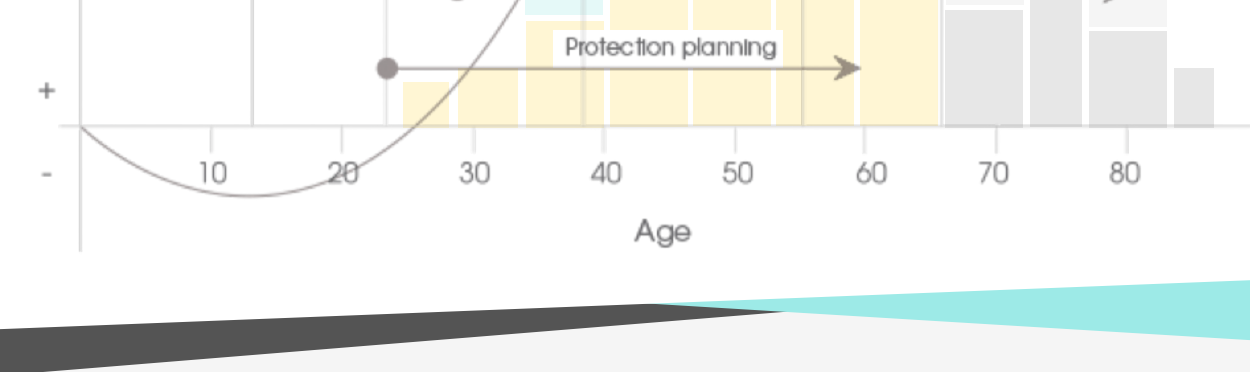
Will we be alright?



Can we afford to?



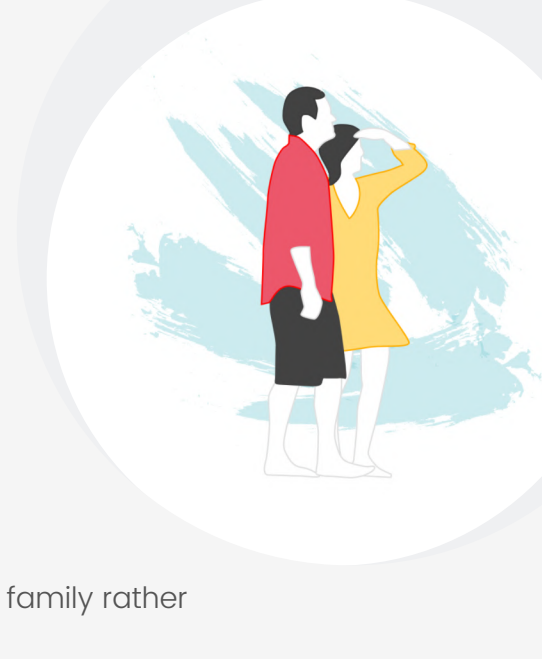
What happens if?



## Benefits of a Financial Plan

Our clients tell us the benefits of having a financial plan include the following:

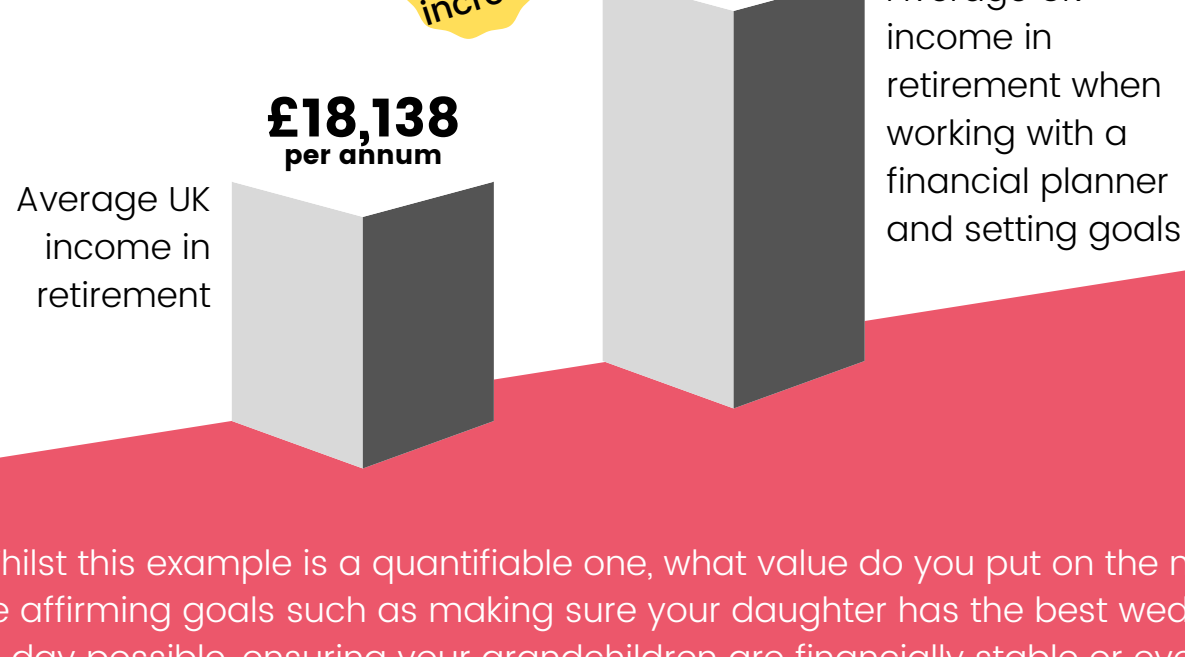
- Putting in place a road map to help them reach their financial goals and aspirations
- Avoiding potential mistakes that could derail their plans
- Structuring their investments in such a way that they don't pay unnecessary tax
- Ensuring they don't miss out on potentially better investment returns
- Removing the worry that they may not remain financially independent
- Creating confidence to know they're heading in the right direction
- Saving valuable time that can be spent with friends and family rather than on money matters



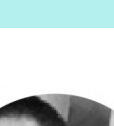
## Is Financial Planning Worth It?

Research has shown working with a financial planner and setting clear goals can increase your retirement income by 53%.

Retirement Income Uncovered - The New Normal 2016



Whilst this example is a quantifiable one, what value do you put on the more life affirming goals such as making sure your daughter has the best wedding day possible, ensuring your grandchildren are financially stable or even making sure you have a memorable family holiday every single year?



## Our Client Stories



**Steven Lewis**

Corporate lawyer Steven Lewis came to Drewberry with his retirement savings in a tangle and no idea where to start unpicking the knots.

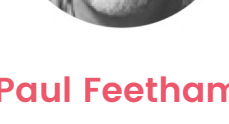
[Read More](#)



**Duncan Howarth**

Former banker Duncan Howarth built up a 23 year membership in Barclays' final salary scheme before starting his own business.

[Read More](#)



**Paul Feetham**

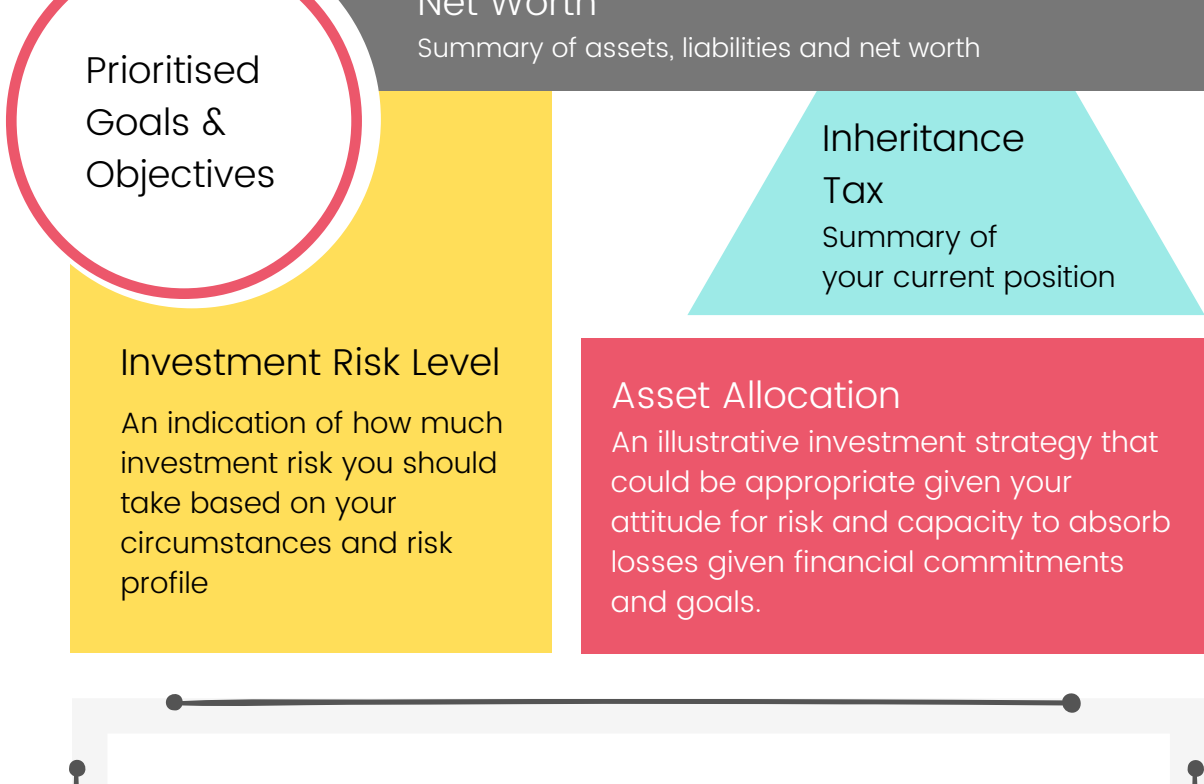
When Paul Feetham came to Drewberry he had five pensions under his belt, including one tricky money purchase scheme with an attached guarantee.

[Read More](#)



## What Will My Financial Plan Include?

We will create your custom financial and investment management plan geared towards your unique financial goals and objectives that have been identified in tandem with your expert Financial Planner.



**Prioritised Goals & Objectives**

**Investment Risk Level**  
An indication of how much investment risk you should take based on your circumstances and risk profile

**Net Worth**  
Summary of assets, liabilities and net worth

**Inheritance Tax**  
Summary of your current position

**Asset Allocation**  
An illustrative investment strategy that could be appropriate given your attitude for risk and capacity to absorb losses given financial commitments and goals.

### Existing Provisions Health Check

Evaluation of your existing investments and pensions, covering:

- An assessment of the investment risk being taken
- An assessment of the investment performance
- Whether they provide good value for money
- Whether they have any options or guarantees that may prove useful
- For pensions, your options to withdraw money at retirement
- And ultimately, how well they are helping you to reach your goals

### Shortfall Analysis

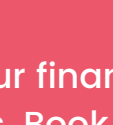
Retirement income shortfall / surplus analysis:

- A comparison of desired retirement income to income sources. Are you on track to meet your aspirations in retirement?
- A forecast of if / when savings and investments will run out. Is there a risk of you running out of money in retirement?

### Our Ideas

Actionable steps to improve your financial wellbeing

We build these plans around important life events, such as business endeavours, family commitments, retirement and ultimately the legacy you could leave for your loved ones.



## Want To Find Out More?

The simplest way to see if our financial planning services are for you is to see exactly how it works. Book in your demo and our experts can show you how we've helped clients like you.

Call us on  
**020 8432 7333**

OR

[Click To Book Demo](#)

Over 2,000 ★★★★★ Client Reviews

**Schedule Your Demo**

🕒 30 min

Discuss your situation with our experts and see a demonstration of how our financial planning service could make it easy for you to organise and plan your financial future.

Select a Date & Time

Financial Planning

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

📍 UK, Ireland, Lisbon Time (3:28pm)

**REVIEWS**

★★★★★ **4.9 / 5**

Rated 4.92 / 5 by 2274 client reviews

