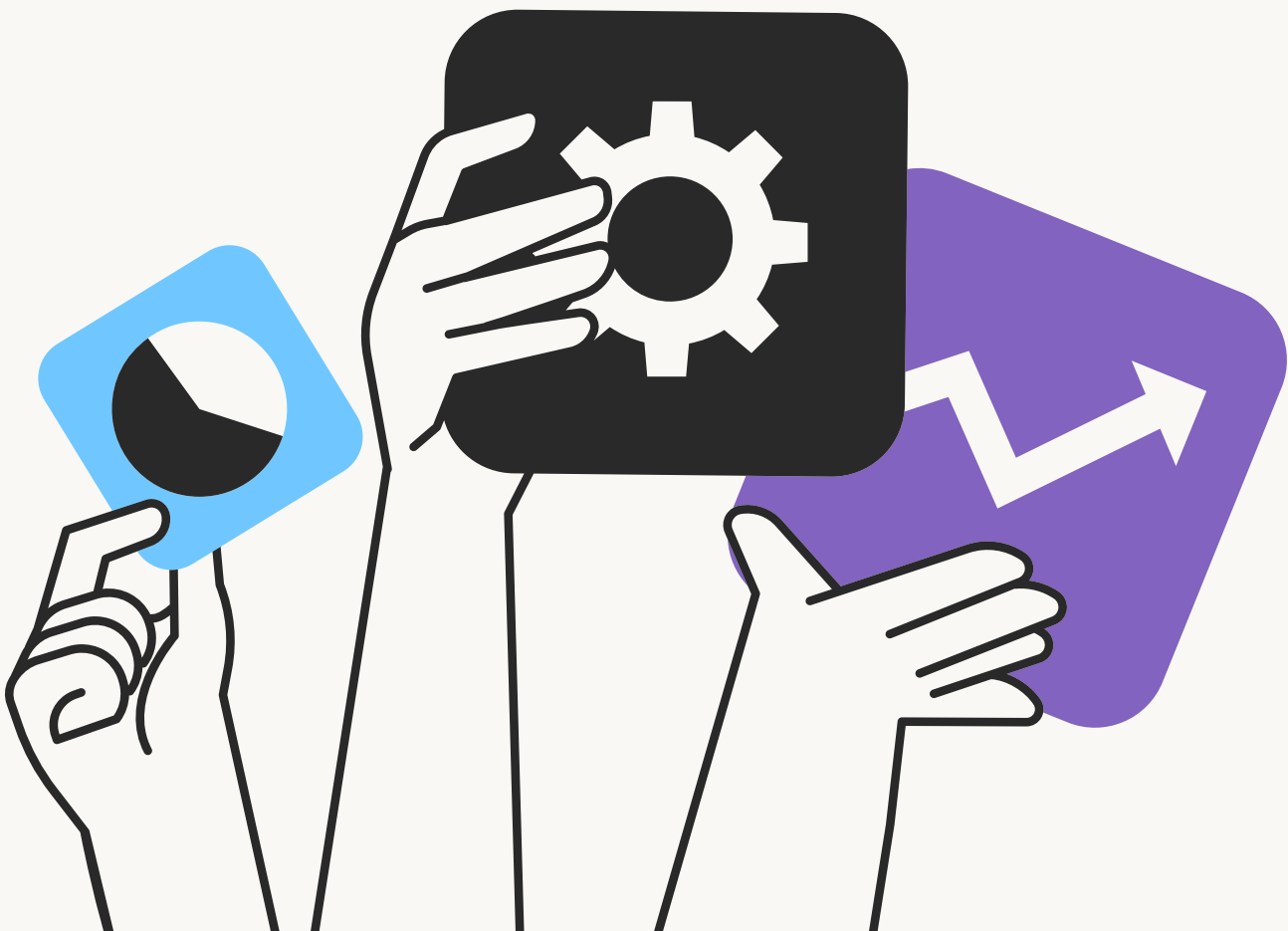


# Financial Affairs

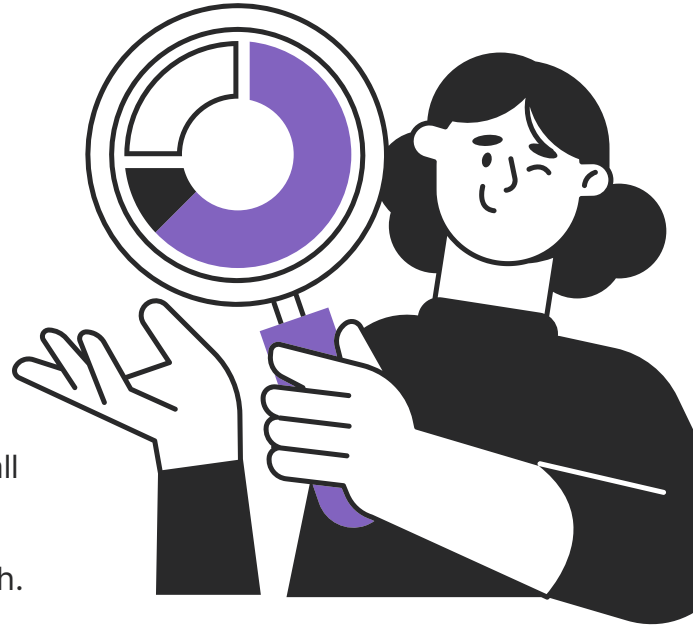
## Our services

Insurance brokers & financial planners



# Wealth solutions

Financial Wellness is our way of knitting together all elements of financial planning to give an overall assessment of your current state of financial health.



This is the gold standard for us as it allows us to analyse and illustrate the extent to which someone's financial situation and the financial capacity that they have developed provide them with security and freedom of choice



## Key areas

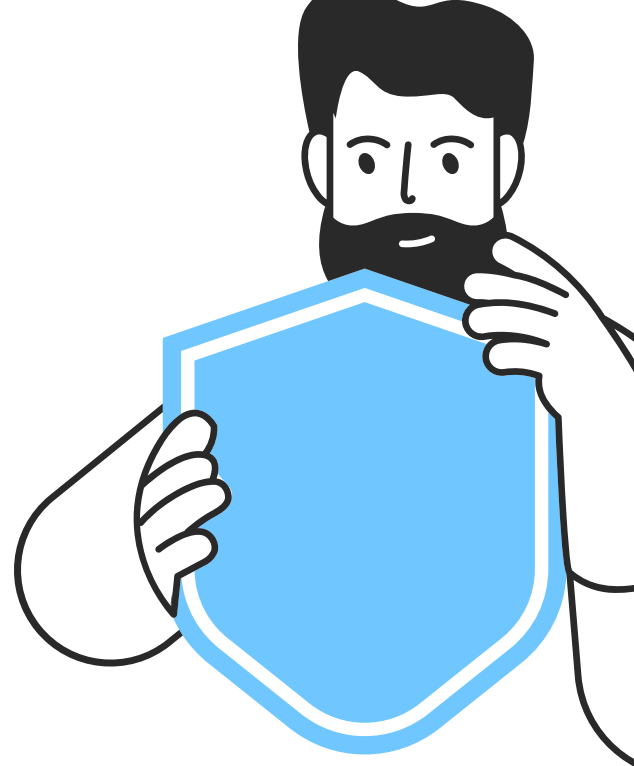
- Savings & Investments
- Insurance
- Mortgages
- Legacy Planning
- Retirement
- Tax Planning
- Family
- Key people
- Professional Network



## Products

- Pensions
- Tax & Trusts
- ISA
- Car Insurance
- Travel Insurance
- House Insurance
- Life & Critical Illness Insurance
- Income Protection
- Mortgages
- Sipp/Sass
- Key Person
- Relevant Life Insurance
- Professional Network

# Insurance solutions



The definition of insanity is doing the same thing over and over again expecting different results. It's time to start treating your insurance differently, take control and better protect your business.

Risk resilience is a proactive assessment of the risks your business is facing that provides an action plan and guides on how to become more risk resilient.



## Key areas

- Manufacturing
- Construction
- Retail
- Rural
- Tech
- Property Owners
- Clip & Climb
- Team Wellness



## Products

- Commercial Combined
- Cyber
- D&O
- Event Insurance
- Business travel
- Motor Fleet
- Public & Products Liability
- Shop Insurance
- Farm Insurance
- Professional Indemnity
- Commercial Vehicle
- Healthcare
- Auto Enrolment

# Financial Affairs



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