

WEALTH PLANNING




STONEHAGE
FLEMING

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.

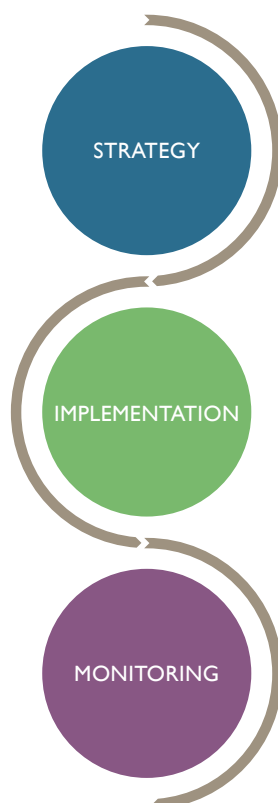
We have extensive experience of working with wealthy clients and through our team based approach apply this practical wisdom for all our clients' benefit.

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. We consider the full range of options in the market to best meet your needs.

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



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 £10bn 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](https://www.stonehagefleming.com/wealth-planning)

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