



# Wealth management a balanced approach

## building and protecting your wealth



We have been looking after clients' money for nearly 40 years and now have over a third of a billion pounds worth of funds under our management. This is spread over a wide range of products and funds, but ultimately is being managed for one reason only - to give you and your family the life you want.

Many people think they have the golden answer to wealth management. Some have a blind obsession with property, believing it to be the solution to so many problems. Similarly many business people think that their company is their pension, ignoring anything to do with proper wealth management.

## balancing act

The real answer, as so often, is about balance. Wealth management is balance: through spreading your investment types. Our job is to help clients achieve this balance.

We believe that if it looks too good to be true it usually is. Our experience of markets and asset types steers us to test (as far as possible) all the products and funds which we recommend. We often invest in them ourselves. We wonder how many other 'advisers' actually invest in the products they so easily recommend to their clients.

## right for you

It is our job to identify what is right for each of our clients. Our qualified consultants are highly experienced and co-ordinate with other professionals.

The Beaumont Robinson valuation and review service checks your holdings and evaluates your current situation against your initial reasons for investment. This is backed up by in-house technical and advanced IT support.

Proper wealth management is promised by many, but so few advisers actually deliver - welcome to the Beaumont Robinson way.

- + Unit Trusts
- + Bonds
- + Deposit Accounts
- + Offshore Schemes\*
- + Discretionary Management Funds
- + Non Regulated Schemes\*
- + Tax Mitigation\*
- + Trusts & Estate Planning\*
- + Lifelong Cashflow Planning\*

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management

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\* The FSA does not regulate all aspects of these services.

Find out more at [www.beaumont-robinson.co.uk](http://www.beaumont-robinson.co.uk)

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