

Wright, Johnston & Mackenzie LLP



Personal Wealth Planning



Do your advisers talk to each other?

To meet your objectives in life, you need a combination of financial, tax and legal advice. But, unless all the pieces of your life jigsaw fit together, your objectives will not be met.

All too often, we meet people who have several different advisers. Frequently, those advisers simply don't talk to each other. Their lack of communication can result in conflicting advice or you having to assemble the jigsaw of their advice yourself. That can be difficult when each adviser may have a different set of outcomes in mind when giving their advice.

This clumsy and time consuming model means that you might not get the best advice for your unique personal circumstances.

Making the jigsaw fit together before speaking to you is the cornerstone of WJM's client centric approach to Personal Wealth Planning (PWP). We look at the whole picture – financial, tax and legal – then give you a single point of contact who co-ordinates all our advice – before we speak to you.

Our advice puts the jigsaw together through taking account of all your personal circumstances.

When you come to WJM, our PWP team put their years of experience in tax and investment planning to work for you. They'll be helped by our legal experts who advise on Wills, powers of attorney, estate management and other legal services. We'll put the jigsaw together for you, presenting you with the full picture.



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Personal Wealth Planning

Our service provides:

- A single point of contact.
- Annual financial planning meeting.
- Ongoing financial advice.
- Ongoing tax advice, including Inheritance Tax planning.
- Quarterly tax, investment and financial planning newsletter.
- Bi-annual valuations of investments.
- Preparation of your Tax Return and calculation of your tax liability.
- Checking HMRC tax coding notices.
- Optional safe custody service – with annual report.
- Optional nominee service.
- Fixed fees.

For help in putting your personal jigsaw together, please contact:

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