

Daniel Green Wealth Management Ltd

Bespoke Financial Planning and Advice.



- Investment Planning
- Retirement Planning
- Protection Planning
- Inheritance Tax Planning
- Corporate Financial Planning

We specialise in providing high quality personal advice on many aspects of financial planning, advising clients of widely differing financial resources and of all ages. We also have a specialist understanding of the NHS pension and advise its members at all levels.

Additionally, we assist businesses in the increasingly complex area of corporate financial planning, providing guidance on pension planning, protection for directors, key employees or shareholders, tax planning and aspects of exit strategy planning.

Putting our clients firmly at the heart of everything we do enables us to run a genuinely client-focused business. In our experience, no two clients are the same and we therefore ensure that we understand your personal or business objectives and deliver solutions that are right for you.

Daniel Green Wealth Management Limited is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website www.sjp.co.uk/products

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