



Bespoke Holistic Financial Planning and Advice.



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

I specialise in helping business owners and professionals with their retirement, investment and protection planning.

I am committed to building long-term, trusted relationships with my clients. Not only do I meet my clients regularly, they are also invited to events where they find out more about what is happening in the world of wealth management.

I feel that it is essential to write bespoke financial plans for clients so I can help them to achieve their goals, and, more importantly, to review these plans regularly to ensure they remain current and accurate as lifestyles and needs naturally evolve over time.

KWM Wealth Ltd 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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