

# The Key Benefits of Financial Advice

Are you getting the help you need?

**GREENARCH**  
WEALTH MANAGEMENT



## Financial Planning

- |   |                                      |
|---|--------------------------------------|
| Regular Planning Meeting                | Planning for the unthinkable         |
| Ad hoc meetings for important decisions | Prioritise financial opportunities   |
| Agree your goals                        | Unlimited access for money questions |
| Forecasting how much money you need     | Second opinion service               |
| Lifestyle funding in retirement         | Outsourced financial administration  |



## Investments

- Make sure your money works hard
- Matching your investments to your risk profile
- Monitoring investment performance and risk
- Consolidation of investments
- Regular updates on investment markets
- A bodyguard between you and product salespeople



## Tax Planning

- Minimising the tax you pay
- Proactive, not reactive, tax planning
- Education on legislation changes
- Tax-efficient estate planning



## Behavioural

- Removing stress by providing clarity
- Helping you avoid regrets
- A "don't do that" service
- Support during volatile markets
- A voice of reason during emotional decisions



## Other

- |   |                                 |
|---|---------------------------------|
| Someone who cares as much about your financial future as you do | Independent sounding board      |
| A co-ordinator between all your professional advisers           | Support for a surviving partner |
| Thinking partner  | Lessons from other clients      |
| Scam avoidance  | Financial project manager       |
| Referrals to other professions                                  |                                 |



Chartered

# GREENARCH

## WEALTH MANAGEMENT

**T:** 0345 474 4750

**E:** [info@greenarch.uk](mailto:info@greenarch.uk)

**W:** [www.greenarch.uk](http://www.greenarch.uk)

Greenarch Wealth Management Limited is authorised and regulated by the Financial Conduct Authority. Company Registered in England & Wales No. 5555136. We are entered on the Financial Services Register No: 605774 at [www.register.FCA.org.uk](http://www.register.FCA.org.uk). The Financial Conduct Authority does not regulate taxation and trust advice. The value of your investment can go down as well as up and you may not get back the full amount invested.



**Chartered**