ORWELL SECURITIES IPSWICH LIMITED

Bespoke Service

Evaluation Process

- A complete review of your existing arrangements and strategies including income/ expenditure analysis
- Establishing your immediate and short term (less than five year) requirements
- Identifying your personal long term goals

The Lifetime Plan

- Personalised advice
- Suitability reports
- Ongoing lifetime plan maintenance

The Implementation Process

- Implementation advice
- New business processing
- Integration of existing provision/plans

The Adviser Client Relationship

- Advised and serviced by business owners
- Impartial advice on the products and services available
- Bespoke planning meetings
- Portfolio management and investment strategy
- Holistic financial health check
- Unlimited access face to face between planned meetings
- Unlimited telephone and email access to the adviser and paraplanner
- Priority response in all communications
- Unlimited valuations (in the format required)

The Investment Strategy and Portfolio Management Service

- Design of a suitable asset allocation (bespoke)
- Portfolio design and construction
- Access to discretionary managers (if required)
- Ethical/environmental screening (if required)
- Access to portfolio valuations
- Portfolio monitoring

Retirement Planning Service

- Pensions advice
- Pensions review
- Pension transfer and consolidation (where appropriate)
- Advice on all pension investment vehicles (including SIPP and SSAS)
- Retirement option advice and report

Family Protection

- Death and critical illness cover
- Income protection
- Trust service

The Estate Planning Service

- Will writing* and probate services
- Trusts and legal services
- Estate preservation
- IHT planning

Family Investment advice

- Financial education
- Children's savings
- Education fee planning
- Mortgage service

Taxation Planning

- To work in tandem with client's accountant
- Tax efficient investment strategies
- Access to technical consultants as required

* Panel of recommended solicitors