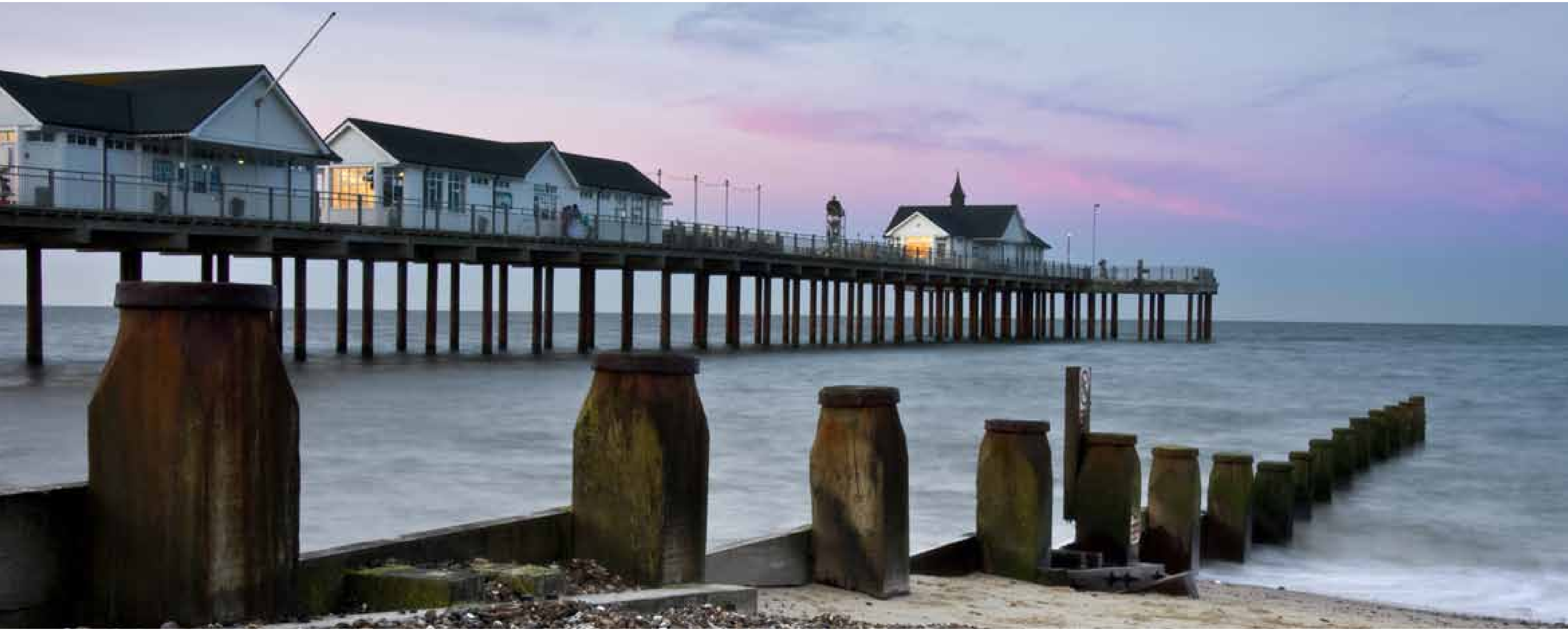
# Park View
Chartered Financial Planners



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# Welcome to Park View Chartered Financial Planners

We are a leading firm of independent financial planners dedicated to delivering the highest standards of financial advice. We have a genuine passion for our work and put our clients at the heart of everything we do.

As a privately owned business we have been trading from Lowestoft on the east coast of Suffolk since 2003. During this time we have established ourselves as the trusted financial planners of many individuals and businesses across East Anglia and beyond. Our success has been built on our core values of transparency, reliability, honesty and integrity.

Over the years we have developed relationships with leading solicitors, accountants and tax advisers. By working in partnership with other professionals we are able to offer our clients truly holistic advice in all circumstances.

> “Our financial planning process is underpinned by our commitment to build and develop long-term relationships with our clients”

> “Our Chartered status means you can be confident that you are dealing with one of the UK’s leading financial planning firms”

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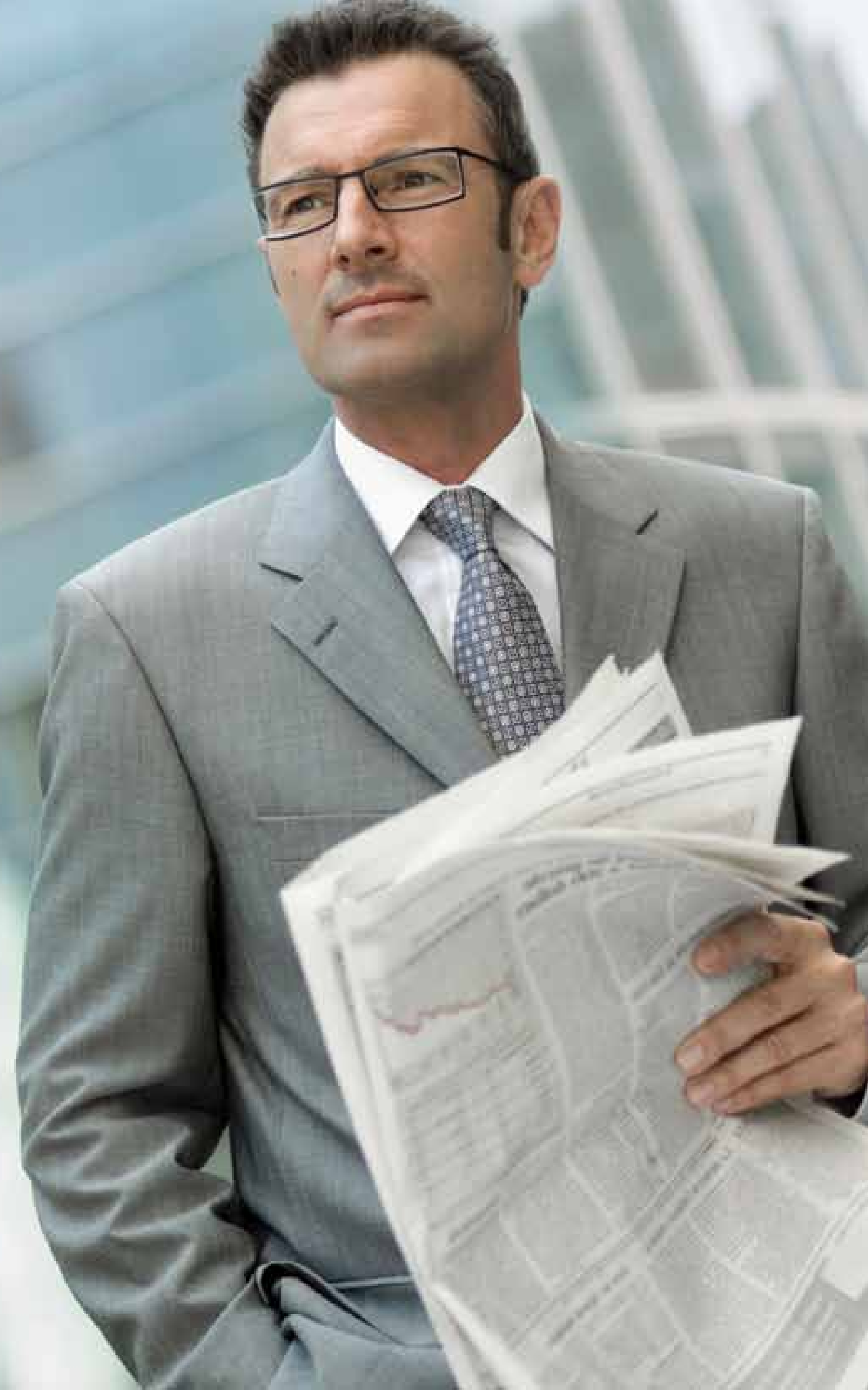


# Our Approach

Our financial planning process is underpinned by our commitment to build and develop long-term relationships. It is by keeping in close contact with our clients that we are able to create the financial planning strategies to meet our client’s financial goals.

We strongly believe that in order to produce a successful strategy a disciplined approach is required. As such we follow a 6-stage advice process:

1. Discovery Meeting - At this free initial meeting we undertake a comprehensive financial review of your personal circumstances and financial goals.

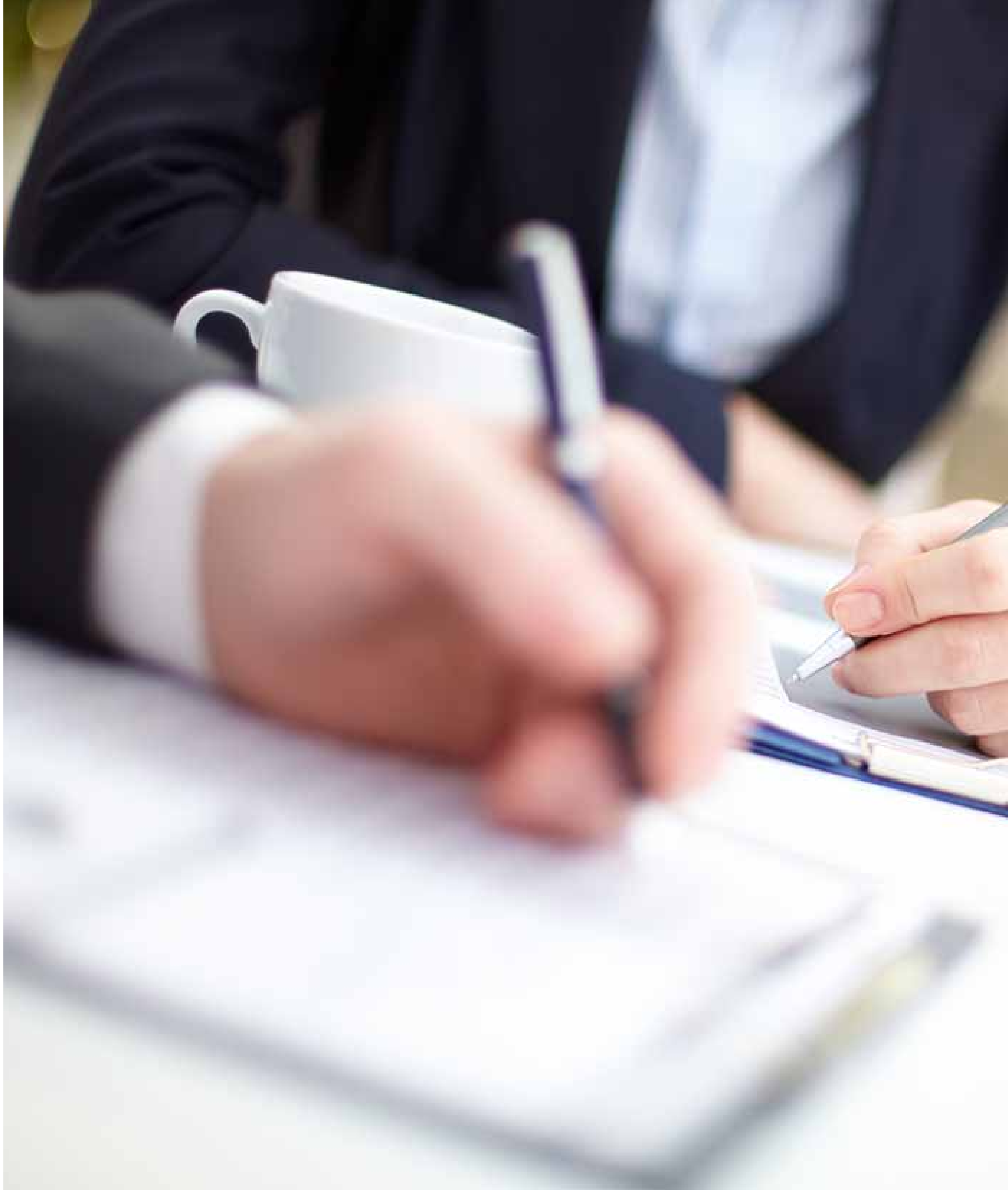
2. Create Your Personal Financial Plan - This will allow us to assess your current financial position and plan towards your future desired lifestyle.

3. Research and Analysis - We will undertake thorough independent research and analysis to tailor and develop our advice.

4. Present Your Personal Financial Plan and our Recommendations - We will discuss your Personal Financial Plan in detail and agree the planning solutions to be implemented.

5. Implementation - We will undertake the implementation of our agreed recommendations.

6. Reviews - We will agree and arrange regular meetings to ensure that the financial planning strategies we have put in place are monitored and adjusted to meet with your changing needs and circumstances.



# Chartered Financial Planners

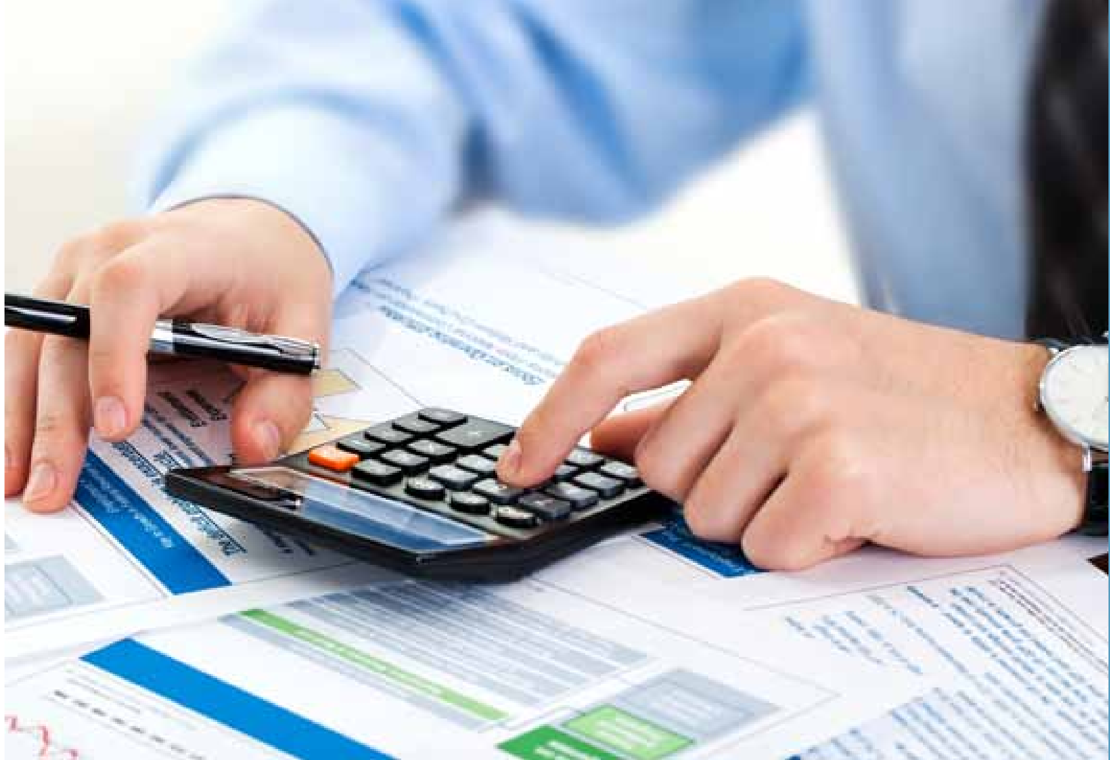
We are proud to have been awarded the prestigious ‘Corporate Chartered Financial Planners’ designation by the Chartered Insurance Institute (CII). This is the highest level of designation that can be awarded to a financial planning firm. Above all the Chartered designation is a promise of quality and professionalism.

All Chartered firms must adhere to the CII’s code of ethics, commit to professional development and CPD, demonstrate strong business processes and maintain membership to the Personal Finance Society.

We believe that our Chartered title distinguishes us from our competitors and offers reassurance that we will always act in the best interests of our clients by providing the highest levels of professional financial planning.

In essence, our Chartered status means you can be confident that you are dealing with one of the UK’s leading financial planning firms, that is committed to providing the highest quality advice, service and support.

FINANCIAL PLANNERS
CII
CHARTERED



# Private Client Services

There are times when it can prove difficult to establish your true financial needs. This is why the foundation of our service proposition is to build a bespoke and comprehensive Lifetime Financial Plan (LFP). Through this approach we aim to create planning strategies that enable our clients to grow and protect their wealth, enabling them and their families to attain financial independence.

Our Private Client Services include the following:

- Lifetime Financial Planning and Cashflow Modelling
- Retirement and Pension Planning
- Income Options at Retirement Including Drawdown, Phased Drawdown and Annuities
- Wealth Management
- Investment Strategies for Capital Growth or Income
- Financial Protection against Death, Critical Illness or Loss of Income
- Estate and Trust Planning
- Long-Term Care Planning
- Private Medical Insurance

# Corporate Planning Services

We understand that deciding on the best employee benefit strategy for a business is an integral part of building a successful company. Working with us means you take the lead and set the priorities by choosing a 'package' of assistance and advice to suit your needs and the needs of your business.

We help our corporate clients develop a strategy that enables them to continue to meet the challenges of a competitive business environment, whilst ensuring they are adequately protected and aware of the constantly evolving corporate financial landscape.

Our Corporate Services include the following:

- Employee Pension Arrangements Including Auto-Enrolment
- NEST and Alternative Solutions
- Group Income Protection
- Group Private Medical Insurance
- Partnership and Directors Shareholder Protection Insurance
- Key Person Business Protection
- Advice Workshops for Staff

> “Your quality of life in retirement will be greatly influenced by the decisions and actions you make now”

# Lifetime Financial Planning

Have you ever thought about when you could afford to retire, take that luxury holiday with the family or buy yourself the holiday home abroad you’ve always wanted?

At Park View Financial Planning we follow an innovative structured process that will allow you to organise your financial affairs and help you to achieve and fulfill your life’s goals.

### A personal lifetime financial plan will:

- Provide you with a roadmap to achieving your desired lifestyle.
- Demonstrate whether you are likely to achieve your goals and establish what changes you need to make to keep you on track.
- Show you how certain catastrophes such as loss of income, serious illness or even death could affect your plans and that of your family or business.
- Help you to structure your investments appropriately to meet your goals and aspirations.

# Retirement Planning

It’s never too early to begin planning for your retirement and at Park View Financial Planning we can help you prepare for later life. Not only will we take account of any existing provision you may have we will also help you to structure a realistic and workable retirement strategy to get you in the best possible place for a comfortable and enjoyable retirement. After all, making your savings grow and being able to choose when and how you eventually retire is likely to be one of your most important financial goals.

# Investments and Wealth Management

At Park View Financial Planning we are committed to creating, growing and preserving your wealth. We will work with you to create an investment strategy suitable to meet your individual requirements based on your future goals, aims and objectives. As a firm of independent financial planners we are able to research our investment solutions from the whole of the market, ensuring you are provided with the very best Investment and Wealth Management strategies.

We strongly believe in building long-term relationships with our clients through regular face-to-face meetings. It's through these meetings that we will review and adjust your investment strategy to meet with your changing circumstances and requirements.

“Everyone has different requirements from their investments and at Park View we have the experience and knowledge to help you meet your goals however simple or complex they may be”

“We understand that over time your needs and priorities will evolve and for this reason flexibility is built into our investment approach”