



Investments

Are you keen to capitalise on the most rewarding investment opportunities, but bewildered by the array of options? Perhaps you are unsure about how well your existing portfolio of investments is performing? We have an expert team of advisers who can guide you through the investment jungle.

The savvy investor reaps rewards

Many of our clients are full of questions about the best ways to invest. You may have investments in property, shares, ISAs, National Savings and bonds, for example, as well as cash in the bank. The value of these investments and the income they produce will be affected by the changing marketplace and economy.

There are also further issues to consider, such as whether to invest offshore, how to take advantage of tax breaks and benefit from capital gains tax allowance.

Our investment service provides impartial evaluation and professional guidance to help you navigate your way to success. Whether you are a private individual or trustee, our highly personalised service will take into account your objectives, preferred level of risk and current tax situation. We can then make informed recommendations about what to do with your existing investments and how to pursue the most fruitful options. As nobody knows what tomorrow will bring, our regular reviews help ensure your investments work hard in the mid-to-long term.

Expert guidance from Kreston Reeves Financial Planning

Our professional financial planners deliver an investment service which we believe is second to none. You can talk to us about one specific issue or ask us to assess or manage your entire investment strategy. Our advice is backed by our own in-depth research and data analysis. We can provide you with insights into financial institutions not easily available elsewhere whilst remaining fiercely independent from those institutions – we'll tell you what the glossy brochure really means!



Looking at the complete picture

We work with individuals and trustees to discuss and advise them about:

- ▼ **Objectives** – looking at your aims, needs and legal obligations.
- ▼ **Risk** – gauging the amount of risk in your existing and proposed investments.
- ▼ **Tax** – ensuring you make full use of available breaks and allowances.
- ▼ **Opportunities** – assessing the potential of different products and investment vehicles.
- ▼ **Performance** – seeking out competitive long-term performance.
- ▼ **Administration** – developing strategies to reduce costs.

A higher level of expertise

Our key focus is providing you with quality client service. We get to know you, so we can help you confidently make the right decisions as you move forward in life and in business. Our approach is tailored to meet your changing needs and to provide you with peace of mind.

It's reassuring to know that the level of expertise within Kreston Reeves Financial Planning is above the industry standard. We are proud holders of the prestigious Chartered Financial Planner status, accredited by the Chartered Insurance Institute – the industry's 'gold standard' for firms of financial planners in the UK.

In addition to providing comprehensive financial planning services, as part of the wider Kreston Reeves group, we also offer a full range of accountancy, tax, business advisory and legal services in-house. As with all that we do for you, these will be tailored to your personal needs and circumstances as discussed with you throughout our communications.

Knowing your business, tax and wealth needs. Our offices are across London, Kent and Sussex

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