Retirement planning

Are you looking forward to a time when you can wind down work or retire altogether? Are you unsure about how much money you will have to support you as your life changes? At Kreston Reeves Financial Planning, we have an experienced team that specialises in planning your move towards retirement.

Everyone is different

Deciding how to fund your retirement is an important financial objective, no matter what your plans for the future. During our years of specialist retirement planning, we have seen a move away from the traditional employment-to-pension transfer, into a more gradual transition and individual approach.

You may want to continue working and ease into retirement gradually, taking on consultancy projects or reducing the amount of hands-on involvement in your business. You may want to change your lifestyle completely by travelling, moving abroad or funding a charitable project.

Because everyone has their own ideas, we discuss your personal priorities rather than focusing on products such as pensions. The key is to identify which assets will provide an income and assess the effectiveness and the amount of risk in your existing investments and plans. We can then provide impartial recommendations that will help you achieve your goals, at your own pace, in your own way.

Expert guidance from Kreston Reeves Financial Planning

Our professional financial planners have many years of retirement planning experience behind them. You can talk to us about one specific issue or ask us to look at your retirement plans in general. We will take the time to discuss your hopes and objectives, assess your current assets and investments and create an appropriate financial framework that can take you forwards.

Your questions about the future

Once we have carried out an initial review, we can then offer advice in areas such as:

- I'm not sure how much my pensions and retirement savings are worth or how much income they will give me?
- Should I draw out a tax-free lump sum?
- Should I defer my state pension?
- How tax-efficient are my investments?
- Can you provide a projected cash flow for my retirement?
- What happens if I have to pay for extra help or care in later life?

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.

Your peace of mind

Acting on your behalf: If you would like professional management of your investments, we can administer your portfolio on an ongoing basis. You can also choose members of our legal team to fulfil the role of trustee, executor or attorney, relieving the burden and personal legal responsibilities associated with these important roles.

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

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