

Financial planning and wealth management for private clients

LUCAS FETTES



Independent, objective advice and solutions

Your financial planning and wealth management needs are unique to you. As a leading independent financial planning practice, Lucas Fettes can help you build, manage and protect your wealth according to your individual circumstances.

We can help with:

- Tax efficient financial planning, including cash flow forecasting
- Protection of wealth/family
- Retirement planning
- Investment management
- Trusts

Our approach

Our team of experts will use the breadth of their experience to develop a realistic financial plan for you. This will involve:

- Understanding your current circumstances, needs and objectives
- Undertaking research in developing your financial plan
- Agreeing your financial plan with you
- Implementing your financial plan with ongoing reviews at agreed intervals.

Our team are committed to adding value through giving you straightforward advice at every stage. We will agree with you what your ongoing service requirements are and which of our service options best suits you. We provide full cost transparency, detailing the work that will be undertaken and how it will benefit you, ensuring you fully understand the arrangements.

For more details on the different service options we offer and what these include, please see overleaf.

Your personal service options

	Inform Minimum of £350 p.a.	Comprehensive Minimum of £1,500 p.a.	Bespoke From £3,000 p.a.
Servicing By agreement with you to suit your requirements and unique financial planning needs.	✓	✓	✓
Opinion Available for the provision of general financial comment, opinion or advice as required.			✓
Liaison Liaison with associated professionals, e.g. accountants or solicitors, to ensure a co-ordinated approach.		✓	✓
Tax planning Notification of investment & tax planning opportunities as they arise.		✓	✓
Tax returns Provision of required information, requested by you or your authorised tax advisers, concerning plans and investments held under our agency, to assist with formulating your personal tax return.	✓	✓	✓
Investment Oversight of investment performance and assessment against agreed benchmarks and objectives.		✓	✓
Planning & ongoing suitability Review of financial objectives against plan and agreement over changes to objectives/plan adjustments.		✓	✓
Cash flow modelling services Review of your current and forecasted wealth to keep you on track with meeting your financial planning goals.			✓
Reporting Provision of a consolidated review report, showing asset totals and movements.	✓	✓	✓
News Newsletters covering tax changes, market update legislative/government policy developments relating to financial planning and associated matters of interest.	✓	✓	✓
Records Secure maintenance of all records relating to financial plans, agreed objectives, contract details and valuations.	✓	✓	✓

Contact us

If you would like further information on any of the above services or how we can help you, please do not hesitate to contact your Lucas Fettes Financial Planning adviser, call us on 01603 706 820 or email info@lffp.co.uk.

www.lffinancialplanning.co.uk

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