

Brochure Copy

## Front Cover:

- 1) Header: (Frame 1) **Winshaw Financial Planning LTD**
- 2) **Financial Plans Based Purely on Facts**
- 3) *Graphics* (Suggest from Winshaw Wrap page)
- 4) **We Show You How to Mind your Money and Plan Now for Joyful Retirement Years.**

Footer: **Your Future is Too Valuable to Leave to Chance.**

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## Pg.2-3

**A Good Plan for a Sound Retirement** (+Graphics)

It brings peace of mind to all of our clients as they plan for life in retirement. How do you do it? It is simply a matter of planning. That is where Winshaw Financial Planning is strong. First, we identify and dispel the fears and concerns of all of our clients. Next we establish the amount of money that would allow them to live the lifestyle they earned, for the rest of their life. Then we consider the impact; changes in markets could have, and a client's capacity to deal with a drop in the value of investments. We get a full picture; build up a profile, go through a series of forecasting exercises and then complete a doable plan.

**Spot On If You Are Over 50**

Winshaw Financial Planning bonds well with the 50 and over age range. Our clients in this group are at the age when they assess their assets with a view towards retirement. It is also a good time to develop a plan that sets you up at 50 for life at 70 and beyond. Whatever stage you are at, you can trust Winshaw Financial Planning to advise you; guide you and devise a plan that is spot on for you.

**One on One Planning.**

Our approach is practical. It is as hands-on and one on one as it must be with the stewardship of our clients' assets. Best of all, we strive to preserve investments and develop strategies that generate growth; not for now; but for a lifetime.

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**Pg.3 Thorough Financial Planning** (+graphics)

At Winshaw Financial Planning we are confident that we bring our clients a complete planning service. Why is this so important to you? Because we know you deserve more than the usual service offered by lots of financial advisers. We keep client numbers low, so you get undivided attention day in and day out. For instance under **Investment Portfolio Construction and Management**, we bring you unsurpassed Portfolio Analysis and the finest:

- Risk Profiling;
- Monitoring
- Annual Reviews
- Portfolio Balancing
- Valuation

Under **Tax Service:**

- Tax Liability Reduction
- Tax Strategies
- Estate Planning

Under **Pension Service:**

- Retirement Planning
- Personal and Corporate Pension Scheme Assessment
- Specialist Pension Advice

We consider ourselves to be custodians of our clients' money and as such, we work hard; hard, to protect it.

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**Pg.4-5. Three Steps to a Secure Future (+Graphics)**

We give nothing but our best in all we do to protect your financial future. Our experienced planners use our exclusive three step approach to set up a plan that puts you on course for a good life in your retirement. Our clients trust us and step by step we deliver.

- 1) **Life Planning**; we hear you out and then start our fact-finding with questions about your lifestyle, your expectations and financial goals.
  - 2) **Financial Planning**; we complete an up to date analysis and the client's expenditure. Then with the help of our powerful financial planning software, we peek into future, and show the client.
  - 3) **Financial Pilot**; if the Plan suggests a need for improvements to fulfil lifetime ambitions; we explore the market for the products best suited your needs.
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**Pg.5. Ethically Correct (+Graphics)**

At Winshaw Financial Planning, we help our clients to manage assets as well as their tax liabilities. We are upright. We respond to every financial planning need, and we do that in keeping with our stringent code of ethics. It is also written that we must stick to the highest ethical standards and transparency. We do. Further, we are duty bound to act in the best interest of every client and to work fairly, regardless of colour, race, religion, age or disability.

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**Pg.6 Back Cover 1. Winshaw Financial Planning LTD****2. Your Award Winning Financial Planners (+Graphics)**

Winshaw Financial Planning is a top ranking financial planner. It joined the best in the world when it was awarded 'financial planners' Charter Status by the Chartered Insurance Institute. The commission is the industry's gold standard for financial planners. This means that our clients can rest assured that with us, they are in some of the best hands in the financial planning industry in the world... Charter Status also confirms that Winshaw Financial Planning, vows to observe the industry's code of ethics and maintain professional development, as an on-going feature of its operations.

Footer: **Your Path to a Bright & Cheerful Retirement**

Logo

Full contact details.

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