Professionals and Executives

Take control of your future

Unless you are lucky, the days of the large paternalistic employer providing a job for life with a final salary pension are long gone. But here, you are not on your own: we will work with you to build a flexible plan of your own.

As your career develops and matures, you might have multiple short, medium and long-term financial objectives: perhaps repaying the mortgage, planning children's education and investing for retirement all compete for a share of disposable income. You might be changing jobs and need advice on the benefits offered by a new employer; or becoming a Partner; or starting your own business.

Our ***Professionals and Executives*** Service aims to:

- **Quantify your 'number' –** how much you will need to retire – **and how to get there**
- Plan a tax-efficient retirement income from **all of your assets**:
    - We will agree with you an appropriate strategy, so your family's financial future is assured, whatever happens in the markets
- Make the most of your resources and opportunities. This might include:
    - *Tax Alpha*: Optimising pension contributions and other tax-efficient investment allowances
    - *Bad things can happen*: a gap-filling audit of your employee benefits or other options you have to protect your family and lifestyle in case of death/ill health
    - *A clearer view ahead*: consolidating your pension arrangements
- Keep you Informed – the goalposts will get moved, we will update you promptly and advise you of any action you need to take

Our Services

Before we start we will:

- Get to know you, your current financial position, and your needs and objectives.
- Obtain information and review the features of your existing products and policies.
- Liaise with your other professional advisers.

Agree and implement the plan:

- You will receive a tailored report that clearly sets out our advice.
- We will explain how the solution aims to meet your needs and objectives.
- Your solution will be centred on your financial security, providing a suitable and tax efficient investment strategy.
- We will implement the agreed plan, prepare documentation and liaise with the product providers

As you would expect, the service also includes:

- A Review Meeting to monitor progress towards your objectives
- Access to the Autonomy Wealth investment service
- Access to our Advisory Team - calls and emails returned within 24 hours
- Online access to your portfolio via platform
- Liaising with your other professional advisers and we will refer you to external specialists when you need them
- Help with wider family issues – education funding; long term care; legacy planning