TAYLOR FINANCIAL MANAGEMENT

Welcome to Taylor Financial Management

We build long lasting relationships and help our clients plan for their long term goals

Welcome

Welcome to Taylor Financial Management. We are a boutique wealth management firm specialising in providing bespoke, holistic financial planning to our clients.

We started the company because of our lifelong passion for investing, and the satisfaction felt when helping people achieve peace of mind with their financial positions via financial planning, education and investment management.

In these uncertain, volatile and ever changing times, it has never made more sense to seek bespoke, unbiased, expert and independent financial advice to plan for your financial future. Whoever you decide to work with for your financial planning, it is imperative that you are satisfied that the advice you receive is for your benefit, rather than your adviser's, or that of a much larger financial services company.

Too often, we hear stories from clients regarding their previous poor experiences with financial advisers. One common theme we often hear is experiencing the overwhelming feeling of being sold to. We strongly believe an adviser should work with you to help you achieve your goals, not just sell products on behalf of a larger firm.

At Taylor Financial Management, we won't sell you any products, just advice. Of course, we can assist you in the implementation of any financial strategies, and we are more than happy to do so, but our core proposition is the highly bespoke advice that we provide. We will look at your current financial position and not make any unnecessary recommendations. Sometimes we just need to provide our clients with peace of mind.

Our business grows through recommendations from our customers. We are only successful if our clients are completely satisfied, which is why we consider our clients to be partners in our success.

We regularly post informative content on our social media channels and would be delighted if you followed us. Please also swing by our website www.taylorwealth.co.uk for further content such as regular industry updates, our thoughts on investing, financial planning and more. You will also find our calendar of regular client events which we would be delighted to welcome you to.

If you have not already done so, why not contact us for a complimentary discussion to see if we are the right fit for you. We look forward to working with you.

James Taylor
BA (Hons) DipPFS
Managing Director & Principal
Taylor Financial Management Limited

We have over 20 years experience in financial markets, making us some of the most experienced and able professionals working in wealth management today.

Work smarter, together

Being able to call upon the services of an adviser who understands your personal circumstances, and who focuses on building and maintaining a long-term relationship, enables you to benefit from a source of trusted advice as your financial needs evolve over the years.

Putting you firmly at the centre of everything we do is core to our culture. This enables us to run a genuinely client-focused business based on building long-term relationships founded on mutual respect. We recognise that your objectives are individual, so our holistic advice is tailored to reflect your personal circumstances.

If we do this well, we believe that not only will you remain a client, but that you may also become an advocate for us. In fact, our clients often continue their working relationship with us over many years, appreciating a source of trusted advice as their financial needs and priorities evolve over time.

We aim to deliver on our commitment to you by:

- Providing personal, face-to-face financial advice
- Giving you the opportunity to review your financial affairs regularly
- Helping you manage your investments effectively
- Ensuring that our correspondence and literature is clear and easy to understand
- Listening to your feedback
- Ensuring that our dealings with you are sensitive to your needs.

We want your experience to be positive in every sense and for all of your dealings with us to meet with your complete satisfaction.


Our clients are at the heart of
everything we do.

The right financial tools meet your objectives

We do not believe in providing a rigid investment proposition, we recognise that each of our clients have individual needs and requirements. We make investment recommendations based on each client's individual circumstances and have unrestricted access to the whole of the investment market. We only work with carefully selected providers, whose quality is assessed regularly to ensure they meet the exacting standards required in order to be recommended to our clients.

Whilst we are specialists in investment and retirements planning we are at our core a holistic financial management firm, who are able to assist and guide you in all financial matters. Some our core services include:

Investment Planning

We can build bespoke fund portfolios tailored to our client's individual needs, to build wealth and to protect against inflation. We also can help you to arrange your investments as tax efficiently as possible, whether for you, your family or other beneficiaries.

Retirement Planning

While making plans for a long and prosperous retirement is likely to involve investment in pensions, the range of strategies has never been wider. With people now generally living longer, knowing how to take advantage of the opportunities available is vital, making our advice important to both private individuals and business owners.

PROTECTION

Protecting yourself, your family and your business can make a real difference to your life and those you care about, both today and in the future. We are specialists in providing solutions to meet exceptional insurance needs, including the protection of companies and the people who own and manage them.

Cash Flow Modelling

A key part of producing a financial plan is the process of cash flow modelling. This is where we use advanced technological tools to map out your financial future. This will enable you to see how you finances will fare after a multitude of differing financial scenarios.

INTERGENERATIONAL WEALTH

Traditionally, wealth has passed from one generation to the next upon death. However, intergenerational wealth management looks at how families can use their wealth more collaboratively during their lifetimes.

Tax Planning

Tax efficient planning forms the cornerstone of all that we do and tax is implications are carefully considered with all of the advice that we provide. In addition, we are able to assist higher and additional rate taxpayers, directors and business owners to arrange their finances tax efficiently with the aim of limiting their long term tax liabilities.

OTHER SERVICES

In order to complement and enhance our own range of services, you also have access to carefully selected external providers. We believe these providers represent the best of breed in their respective fields and are capable of delivering the high standards of service you would expect. We work regularly with specialist advisers in the areas of tax, mortgages, equity release, wills and probate, trusts and more.

Welcome as our client

No matter how you come into contact with us, the first priority will be to get to know you as an individual. By doing this we can form an understanding of your personal circumstances and future financial objectives.

We feel it is important not to rush the financial advice process. The more comfortable you are and the better we understand your goals and objectives, will in turn lead to better advice. This process can sometimes take just a couple of meetings or several, the pace is up to you. What is most important during these initial meetings is that we develop an in depth understanding of your goals and objectives and that you feel comfortable working with us. These conversations also provide space to allow you to understand our services and decide whether you would like to become a client. Taking time to get to know each other builds trust and helps to establish a long-term working relationship.

When we fully understands your requirements, we will recommend options to help you achieve your goals. We will also consider whether additional planning, such as tax planning or the use of trusts (not regulated by the Financial Conduct Authority), could help you to arrange your investments more efficiently.

Our approach is to be open and honest in all of our dealings with you; so we will explain our charges, your statutory rights, any protections that apply and confirm all of our advice in writing. Should we implement an investment or a financial product on your behalf, we will write to you with full details.

Whatever the level of your investment, it is as important to us as it is to you.


Getting to know each other builds trust and
establishes a long-term relationship

Our on-going relationship

From the moment you decide to become a client, we aim to demonstrate the value of this relationship through the service that we deliver to you.

As you know, in life, nothing is permanent. One thing that we can guarantee is change, whether that is personally, physically or financially. We would like to be with you every step of the way to help you prepare for any twists and turns in the road ahead.

Whatever the level of your investment, it is as important to us as it is to you. We recognise that your satisfaction as a client will depend on how well we look after your investments and keep you informed.

We recognise that it is what happens after you invest that will determine whether the outcome meets your expectations. This is where your relationship with us really is different. After all, putting you firmly at the centre of everything we do is core to our culture and your relationship with us starts, rather than ends, at the point you decide to invest.

We also consult with clients directly through satisfaction surveys, focused research and client events. You should also feel free to contact us directly at any time, which you can do by calling our Head Office on 01245 520 001.

At Taylor Financial Management, your relationship with us starts, rather than ends, at the point you decide to invest.

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