

FINANCIAL ADVICE
← →
For the entire family
CWB. It's more than just
financial advice



The Everard Family
L to R: Beth, Chris, Deb

I'm a company owner manager and have worked with Graham at Clarkson Wayman Ball for many years.

After a business sale he advised me on my personal investment portfolio and helped us to plan to achieve our personal and family objectives. Clarkson Wayman Ball provide a family office style solution, working alongside our solicitor and tax accountant and will writer. They understand our needs as a family then assemble and coordinate a team of professionals to sort everything out on our behalf.

I've have dealt with Graham since 1994. He was part of a beauty parade when I originally set-up my business and needed to appoint a financial services partner. We worked with him throughout the life of the business for financial planning advice and ongoing support.

Clarkson Wayman Ball now manages all of our financial affairs as a family. We had a large amount on deposit and required a regular income from our investments.

We needed ongoing tax management and guidance, especially with regard to our inheritance tax liabilities. We also wanted to gift money to the children and have this invested on their behalf.

They consolidated everything - pensions and investments - into the one place using their technology platform, making it easier to monitor and manage. Our investment strategy is aligned to the level of risk we're comfortable with and their ongoing taxation advice ensures we make use of our available allowances. They've set-up a protection policy to pay our inheritance tax bill and advised us on the implications of gifting to the children.

Graham also advises our daughter Beth, who is making use of her ISA allowances and investing across a range of investments.

On an ongoing basis Graham is working alongside a team of other professionals - our tax accountant and solicitor - to make sure all aspects of our affairs, as a family, are being taken care of.

“ *I enjoy working with Graham and the team at Clarkson Wayman Ball. They concentrate on building personal relationships and are approachable. They've looked after us since the sale of the business. I have a lot of confidence that our affairs are being dealt with responsibly.* **”**
Beth Everard

“ *I have a long term relationship with Graham. He has built a level of trust that makes me feel 100% safe with him handling our finances. He is highly qualified, professional and knowledgeable. He works with our tax accountant to deliver advice that makes our money work for us.* **”**
Deb Everard

Please note that this is a real client case study. It is not intended as a guide to advice. Individual circumstances can differ and you should seek financial advice before embarking on a course of action.