

## FINANCIAL ADVICE



For corporate clients

CWB. It's more than just  
financial advice



Chris Beach, Director  
Central Regalia Limited

***I have known Graham for more than ten years and received advice in a number of different areas. His advice was always extremely sound so we asked him for support in our business: to set-up our corporate pension, review our protection policies and employee benefits.***

We wanted to make sure our arrangements were effectively meeting the needs of our employees and we were adequately covered should anything go wrong.

Graham is very thorough. He took time to identify and understand our specific requirements. The team then reviewed our existing arrangements and researched the market to find the most appropriate policies to meet our needs.

They prepared a detailed report and recommended we establish a group stakeholder pension, group private medical insurance and a number of insurance policies for our business protection.

Graham recommended that we set up a SSAS to hold company property. In addition we invest surplus profits and rent into a Trustee Portfolio Account within the SSAS which is aligned with our attitude to risk. The fund performance is reviewed quarterly to ensure it remains aligned to our risk preferences. We also receive regular communications and updates.

We agreed the way forward and the administration team implemented our strategy. We were impressed by their expertise and professionalism, as well as how quickly they managed to set everything up on our behalf.

Working with Clarkson Wayman Ball we now have a pension scheme that more than adequately meets the needs of our employees. Our benefits package provides them with private medical insurance and access to financial advice specific to their situation.

The biggest benefit: knowing we now have the right insurance cover for our business. This is an area which had been missed in the past. The team helped us to rectify the situation, increasing our protection in specific areas. Their advice proved invaluable when we needed to make a claim under our critical illness policy.

***“ Clarkson Wayman Ball is a confident and professional outfit, which is exactly what you need when it's your money they're looking after. Graham provides with us a lot of advice on an ongoing basis. We view him as a part of our company and integral to planning for our future growth. We would highly recommend him both to individuals and business owners.”***