

FINANCIAL ADVICE

Investing made easy

CWB. It's more than just
financial advice



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I was concerned about the volatility in equity markets. In 2007 I had a significant amount of my portfolio invested in equities and my existing adviser was far from proactive. I was looking for someone who understood my needs and could recommend a diversified investment strategy to withstand different market conditions.

My accountant personally recommended Colin at Clarkson Wayman Ball (CWB). We had an initial meeting and I was immediately impressed. He knew exactly where I was. He listened to what I was saying and quickly understood what I was trying to achieve.

The CWB process involves helping you clarify what you need, putting this into a framework, gaining your agreement and executing the strategy on your behalf.

They began by identifying my goals and attitude toward investment risk. Colin worked with me on a very individual basis, taking into consideration my personal

needs. The team reviewed all of my policies, looking at the options, guarantees, future benefits, charges and any penalties.

They researched the market to find the best policies and investment strategy to meet my requirements for diversification and low risk tolerance. They also looked at my life cover, given my concern for Deborah to be adequately taken care of. Their recommendations were delivered in a detailed plan, which we discussed and agreed.

All paperwork was completed quickly and accurately. The administration team filled in most of the forms, minimising the input required from me. They also liaised with the different providers to set-up the strategy on behalf.

I now have regular review meetings to ensure I remain on track. And whenever I have a query the team are friendly and helpful. I know that no matter what, they'll always find the answer.

One of the biggest benefits of working with CWB is that it's not just Colin providing advice. The team deal with my queries and I always get a personalised service, individually tailored to my needs. I find them easy to deal with, proactive and flexible. They're also happy to work around my schedule - which often means meetings in the early morning at home or in the office.

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.

“ Based on my experience working with Clarkson Wayman Ball, they have always provided the best advice and I have genuinely benefited as a result. ”