

FINANCIAL ADVICE



For corporate clients

CWB. It's more than just
financial advice



Jim Dickens
GRS Roadstone Limited

We needed to appoint a financial adviser and wanted to work with a firm who would provide a personal and hands on approach to managing our corporate pension, protection policies and employee benefits.

We needed to feel confident that our strategy was appropriate to meet our needs. That the information we had to hand was accurate and could be relied upon. Our arrangements had to suit the personal preferences of our directors today, as well as provide and plan for their future exit.

Prior to appointing Clarkson Wayman Ball (CWB), we had consulted a number of different financial planning businesses. We were looking to work with a firm that could provide a consolidated service and cover all of our planning requirements - including the appointment of a new Professional Pension Trustee.

The team at CWB undertook research into our existing corporate pension and employee benefits arrangements. They also looked at our protection and income provisions, then developed a plan and presented to our Board.

We gave considerable thought to our decision as to who we would appoint. Their presentation and attention to detail gave us

the confidence we needed to make the decision to take them on as our corporate advisers.

After winning the mandate, they took over the management of our existing pension and protection arrangements. They appointed Dentons Pension Trustees, a firm with whom they work with closely, as the Trustee for our pension scheme.

Their Private Medical Insurance specialist reviewed our existing scheme and recommended we move it to an alternative insurer. They managed to secure the same benefits but achieve a reduction in premium of over 25%.

CWB provide a highly personalised service for our pension scheme members and staff. Their advisers work with our employees on an individual basis, advising new joiners and working with existing scheme members on an ongoing basis. They provide bespoke financial

planning advice to help our employees take care of their future. Regular reviews help them stay on target to meet their goals.

Their senior advisers host review meetings with the Board at agreed time intervals to make sure our corporate pension and protection arrangements continue to meet our needs.

We like the personal contact. The team are efficient and responsive, which makes the service far more personalised than what we'd experienced in the past. It is more than just a clinical operation - which is often how corporate planning can feel - it's an ongoing relationship.

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.

“ We feel confident we now have accurate information to hand in order to make strategic decisions. The advisers show empathy for our position and deliver a premium service that is efficient, personal and proactive. We wouldn't hesitate in recommending their services.”