

FINANCIAL ADVICE

← →
For international clients

CWB. It's more than just
financial advice



Richard Wayman and Bev Good
Personal Clients

We split our time between the US and UK and needed a strategy to provide alignment of our financial affairs across both countries. We wanted someone to actively manage everything and liaise with our adviser in the US to establish a consistent strategy.

We met with Graham and talked through our requirements, which was for a full review of our existing arrangements: pensions, investments and protection. We had numerous policies scattered across different providers and a large sum on deposit we wanted to invest. Our plan needed to coordinate our affairs across both countries.

After reviewing all of our holdings, Graham prepared a recommendation report outlining how we could consolidate all of our UK pensions and investments into a single strategy, optimised for taxation purposes and making use of our available allowances. The investment strategy was a diversified portfolio, aligned to our risk preferences. They also showed how this plan could be complemented by a similar approach in the US.

We agreed a way forward and the team at Clarkson Wayman Ball set about implementing our plan. This was a quick and efficient process, whereby we completed the paperwork and the administration team liaised with the various providers on our behalf.

Our UK pensions and investments are now held on their technology platform and we have online account access, meaning we can login at any time, from anywhere in the world. Regular review meetings help us keep track of fund performance and make adjustments based on our changing circumstances and risk preferences. They also deliver a clear and concise information pack on the portfolio, so we always know where we stand.

Graham has been in contact our adviser in the US, who is devising a complementary

strategy. They will also use a technology platform, to consolidate our holdings and help us to better manage our affairs.

We now have a sense of control. When our US strategy is implemented we will finally have a consistent solution, which is flexible and designed to meet our ongoing needs.

We really enjoy working with Clarkson Wayman Ball. They provide professional advice that is up to date and delivered by a professional team of people. Their strong emphasis on qualifications and employing best business practices gives us confidence they are keeping up with the times.

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.

“ The team at Clarkson Wayman Ball have integrity. They're also communicative and proactive. I've known the team for a long time - congratulations on ten years' of being in business! ”