

## FINANCIAL ADVICE

For active investors

CWB. It's more than just  
financial advice

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***I'm an interested and active investor. I enjoy watching the markets and making judgments on specific sectors or stocks. Clarkson Wayman Ball have consolidated all of my pensions and investments into the one place, providing me with total transparency.***

I now have a core investment strategy with the flexibility to invest in other areas, should I see an opportunity (e.g. technology and Japan). I can view and manage my affairs more efficiently, it's cost effective and the service is second to none.

My investments were scattered across different providers and I'd taken benefits from some and not others. I needed a way to simplify my affairs. I wanted to adopt a more proactive approach and take charge of my investments without having to look up valuations manually on a daily basis.

I arranged a meeting with Clarkson Wayman Ball (CWB). Graham took time to understand my needs, what was important to me and where I wanted to be. They then reviewed all of holdings and arrangements, and recommended I consolidate everything - my pensions and investments - into the



one place, CWB's wrap. As well taking charge of my investments, the wrap enables me to view my valuations at the "push of a button" through my online access.

CWB's wrap provides access to a far broader range of investments than was available through my previous policies. I have a core investment strategy, agreed and fought over with Graham (!) which is aligned to my risk tolerance. I also make tactical judgments as I see fit. Given my passion for investing we have a two-way dialogue and I feel like I'm totally in control.

They've also made sure my family are looked after, should anything happen to me. I have a protection policy that will provide for my children and cover any inheritance tax liabilities. On their advice and through an

introduction I've also worked with a solicitor to update my will, which was absolutely necessary and will lead to a significant reduction in the burden of inheritance tax.

I really enjoy working with the team at CWB. They are proactive and provide a superior level of service. It's reassuring to simply ask for things to happen and they do, no questions asked. They provide regular updates throughout the year so I always know where I stand. They also let me explore different investment opportunities, knowing the core of my portfolio is actively managed and sets me on the path to where I need to be.

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.

***"I'm always happy to recommend CWB. Although I'm an interested and active investor I know that they have the breadth of knowledge, skills and expertise to work with different people across a range of financial situations. They're capable of providing sound advice across the spectrum of situations and different types of people."***