

# **BARNETT & BARNETT**

## **FINANCIAL SERVICES**

**A lifetime of financial solutions**



# Offering financial services to help guide you through life and business

At Barnett & Barnett Financial Services we offer professional guidance to help both our Private and Corporate clients along the most efficient path to achieving their financial goals.

As Independent Financial Advisers (IFAs), we are able to access the whole financial marketplace on an impartial basis, to select the most appropriate solution to meet the current needs and circumstances of our clients.

We are proud of the high quality personal service we offer and the loyal, long-term relationships we have built with our Private and Corporate clients across the UK.

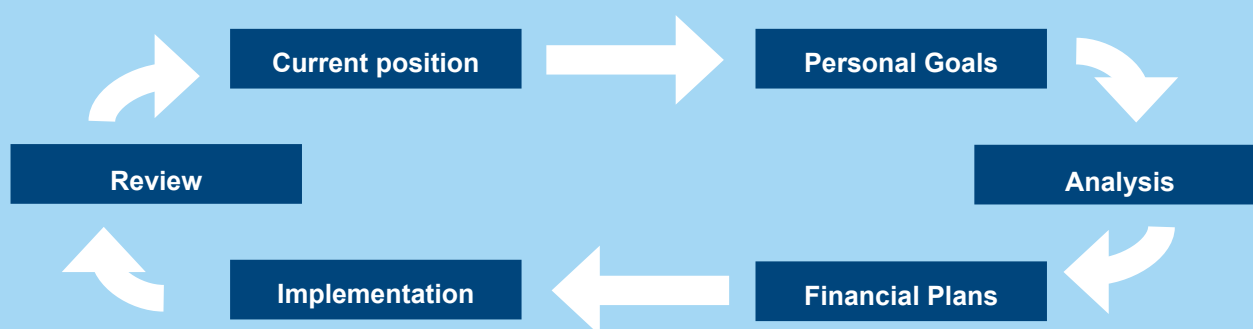
## Personal view – our process

We have a clearly defined financial planning process. We will first establish your personal profile by analysing your objectives and aspirations. We will recommend and work with you to implement a financial plan, then monitor and review progress against your initial and changing goals.

## Core private client services

We have expertise in the following areas of financial planning for our Private Clients:

- Pension planning – stakeholder, personal pensions, SIPPs, pension transfers
- Retirement planning – annuity purchase, income drawdown
- Wealth management – investment bonds, ISAs, collective investments
- Protection planning – life assurance, critical illness, income protection
- Inheritance tax planning – estate planning bonds, whole of life assurance





The friendly service and professional approach that Barnett & Barnett Financial Services have provided Domino's over the past 10 years has been extremely good. I would be very happy to recommend them.

Jane Roberts  
Head of Human Resources, Domino's Pizza

### Corporate view – our process

Just as with our Private clients, there is a process of financial evolution in business that requires carefully chosen solutions. As your business moves forward, our dedicated and experienced team can provide solutions to help protect and reward you, your staff and give you confidence in your company's financial future.

We recognise that the administration of employee benefit schemes can be time consuming. Our aim is to provide employers with dedicated assistance, leaving you time to do what you do best, run your business.

### Core corporate client services

We have expertise in the following areas of financial planning for our Corporate Clients:

- Employee benefit services – group pensions, group life assurance, income protection
- Pension, investment & retirement planning for owners & directors
- Key person insurance
- Shareholder & partnership protection

### We are different to other financial institutions

Our proposition will provide you with the following:

- You will be valued and important to us
- Personal service from your dedicated adviser
- Prompt, efficient response at all times
- Long-term partnership to help achieve your lifetime financial goals
- Experienced professionals who will always act with honesty, transparency and in the knowledge that your interests come first at all times
- Minimal employee turnover and consistent points of contact
- Team-based approach with no individual commission payable to consultants



The advice and assistance provided by your firm has always been professional, thorough and invaluable. Your team is always available and happy to provide support when needed.

Derek Casey  
Managing Director, London Concrete Ltd

Important information

The Financial Services Authority does not regulate taxation, trust advice and will writing.

Investments can go down as well as up and you may not get back the full amount invested.

Barnett & Barnett Financial Services Limited is authorised and regulated by the Financial Services Authority

## Contact us

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