

My WealthPartner Financial Review service

A free one-to-one financial review to check your plans are on track

A free, no obligation service to check your plans are on track, to highlight areas that may need more attention and to assess any key risks and necessary steps.

Available to any Partner, at any life stage, including those with an existing adviser, this review is led by an experienced Close Brothers' financial planner who understands PwC, Partners, your benefits, remuneration and the independence rules.

This is suitable for Partners who want to...

- Establish or update a financial plan
- Review pensions and retirement provision
- Review existing savings and investments
- Review your financial protection
- Consider tax planning strategies
- Consider financial planning for immediate family members
- Establish legacy planning, including inheritance tax mitigation
- Assess whether to manage investments yourself or seek professional management
- Assess the current performance of existing portfolios

You can choose whether the review focuses on one particular area of your finances or looks at everything.

The Financial Review usually lasts an hour and can take place online, at your home, office or by phone. This review can also include your spouse/partner and family as required. Following your review, you will receive a personalised report reflecting the guidance discussed.

The Financial Review service provides financial guidance; it is not an advice service. It can be used anytime alongside the Online, Walled Garden and Bespoke services within My WealthPartner. However, to get full value it's recommended that you use this service annually or when your circumstances or plans change.

Please be aware that the value of investments can go down as well as up and you may get back less than you originally invested. Tax benefits are dependent on your individual circumstances and are subject to change.



Financial
planning



Protection



Savings and
investments



Retirement planning
and pensions



Tax planning

Book your free financial review

To book your meeting please call us on **0800 028 8960** or email PwCsupport@closebrothersam.com. To ensure the review is as beneficial as possible we might ask you to bring copies of your current financial arrangements.