Discover the power of combined advice

Comprehensive wealth management provided by expert financial planners and investment managers

evelyn
PARTNERS

Our combined wealth management service can help you meet your goals.

Evelyn Partners is one of the UK's leading integrated wealth management and professional services groups, with £62.2 billion of assets under management*. With 188 years of experience, over 180,000 clients and 29 offices across the UK and Ireland, we're ideally placed to give you the financial and investment advice you need, all under one roof.

How we work with our clients

It's personal

We have extensive experience in assessing and advising on big life decisions - from retirement and inheritance tax planning, to protecting your family's finances and investing for children.

It's a partnership

We partner with you and our colleagues across the breadth of our business, to help you make those decisions with ease and confidence. We can also collaborate with your other trusted professionals.

We deliver performance

The personalised plan we craft for you aims to deliver against your goals while taking into account your tax structures, Will, trusts and protection.

Many people manage their investments without defining their long-term financial goals, leading to a lack of a coherent and integrated plan. That's why Evelyn Partners offers a combined wealth management service.

An investment manager collaborates with a financial planner to create an individual and comprehensive strategy. The financial planner structures your assets and creates a tailored financial plan, while the investment manager builds your bespoke portfolio. Together, they ensure your portfolio aligns with your attitude towards risk, is tax-efficient and complements your overall financial plan.

Your financial plan

First, we plan your future. We start by turning your life goals into a unique financial plan and review it with you over time.

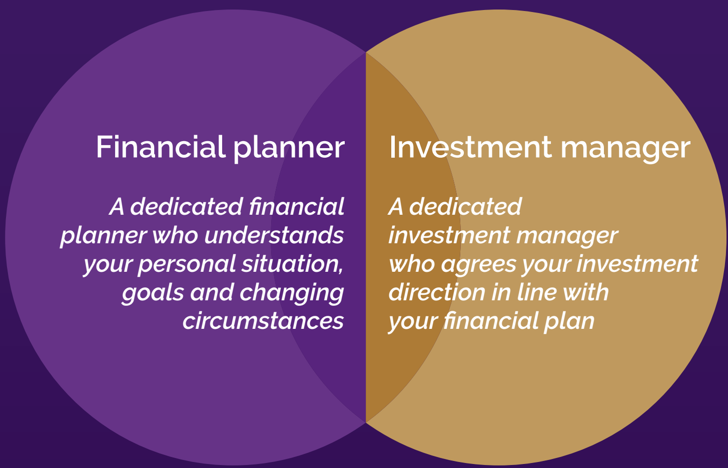
Your investments

Then, we invest for your goals. We invest your money aligned to your plan, attitude towards risk and goals, creating bespoke portfolios in different tax wrappers where available and suitable, such as ISAs and pensions.

Investments carry risk, you may get back less than invested.

*As at 30th June 2024

The power of combined advice



- Cashflow modelling to help create your bespoke financial plan and help forecast your future finances
- Creates a financial plan that complements and optimises your agreed investment strategy
- Your assets structured with advice on wrappers held tax efficiently and managing tax thresholds through investments
- Ongoing reviews of your financial position

- Your bespoke investment portfolio built using our investment criteria
- A tailored portfolio ensures your investments are held tax-efficiently in the appropriate wrappers
- Direct investments as well as funds from across the market are considered along with onshore and offshore
- All delivered through Evelyn Partners' range of bespoke investment solutions with ongoing reviews

Choosing Evelyn Partners combined wealth management means you will benefit from the knowledge of our experts who know you, your family and your goals.

Six reasons to use Evelyn Partners' combined wealth management service

1. Simplicity and speed of communication
2. Combined and specialist expertise in key areas of wealth management
3. Advisers who know you and your goals and then work together to achieve them
4. Tax-efficiencies
5. Cohesive risk management
6. A clear and simplified fee structure

Discover the power of combined wealth management

To see how combined wealth management could benefit you, please contact your usual Evelyn Partners contact.

Personal tax advice tailored to your needs

Evelyn Partners also offers personal tax services as well as financial planning and investment management.

Over the course of your lifetime, tax could be your most substantial financial outlay. That's why it's important to have a specialist, trusted adviser to manage your personal tax affairs. Whether you need assistance with tax filings and obligations, or planning ahead for your own, your family's or your business's financial future, our experts can help.

Financial planning and investment management are two different disciplines. Each requires separate skillsets and qualifications. Combining the knowledge and experience of two specialists could achieve better outcomes for your money.

£62.2 billion Assets under management	**29** Locations and over 4,000 staff	**180,000** Clients	**Number 7** UK accountancy firm Based on total UK fee income for the last financial year Accountancy Age 2023
188 years Experience	**331** Investment managers	**291** Financial planners	**768** Qualified professional services practitioners

Trustpilot

As at 30th June 2024

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E: info@evelyn.com

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Tax advice, Wills, Trusts and cashflow planning are not regulated by the Financial Conduct Authority.

45 Gresham Street, London EC2V 7BG.
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