

Financial Services

We provide independent financial advice to a wide range of clients which includes private individuals, businesses and trustees.

Our highly qualified and experienced team of financial planners are all salaried which means you can be sure recommendations will be based on an expert assessment of your needs without any bias.

Our clients also benefit from the wide range of expertise available within the Ward Goodman Group, which may include specialist tax or accountancy advice. This ensures that a truly comprehensive financial planning service is provided from one source.

Overview of services

We fully appreciate each individual or business has specific financial goals. Whether you are looking to grow your wealth, protect your wealth or plan for retirement, we have designed different services to cater for these goals, namely:

- Wealth Management
- Financial Planning
- Asset Management
- Corporate Review Service
- Trust Review Service

Main advice areas

- Investment planning and Portfolio management
- Inheritance Tax (IHT) Planning
- Pensions including Self Invested Personal Pensions (SIPPs) and Small Self Administered Schemes (SSASs)
- Personal Life Insurance
- Key Person Insurance/Business Protection
- Auto Enrolment

What are the costs?

Your initial meeting with one of our financial planners is without cost or obligation and is called our 'discovery process'.

As we strongly believe in a transparent charging structure, before we commence any work for you we will agree a fixed cost for a Financial Plan. This fee secures our full commitment to provide bespoke advice after carrying out a detailed analysis of your personal circumstances, objectives, existing finances and market opportunities.

If you wish to proceed with our advice and implement the financial plan, we will charge an implementation fee. This implementation fee will be clearly documented in your financial plan so at all times you will be in an informed position.

**All successful relationships start
with a conversation...let's talk.**



Team Leaders



GARETH SIMON

Director of Financial Services



ALEX FOSTER

Chartered Financial Planner

Why Ward Goodman?

- Unrestricted and impartial advice from the whole of the market
- Our focus is on service not product sales with over 70% of our income from existing clients
- A truly transparent charging structure
- We have the ability to access the technical expertise within the Ward Goodman Group
- The provision of a robust and structured review process to keep you on track to meet your financial goals

Make an appointment

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