B&E Financial

Whatever your requirements ...

... give your finances extra lift
with B&E Financial.

Build, maintain and protect your financial wealth

> "B&E listen to what I want. They provide ideas and background on potential investments and make sure I understand exactly what I'm about to invest in."

> "The attention to detail and willingness to help clients is second-to-none."

At B&E Financial we specialise in a number of related disciplines, enabling us to advise individuals on all aspects of their financial life and help them achieve their goals.

Whether your requirements are simple or complicated, one-off or ongoing, we will work closely with you to ensure that you have the very best information and options in front of you at all times.

OUR ADVISERS HAVE EXPERIENCE IN:

- Mid to long term financial advice and planning
- Tax-efficient savings and investments
- Pension and retirement planning for the future you deserve
- Mortgage advice, from first-time buyers to remortgages and investment properties
- A full suite of insurance cover for every eventuality

We often work with clients over a number of years, as their needs evolve alongside their lifestyle changes. A sound financial plan should always be revised with any change in circumstance, whether that be a career or house move, a new addition to the family to provide for, or a change in retirement ambition.

Our advice and proposals are always made on a one-to-one, individual basis, independent of affiliations with products or lenders, to ensure that you have the widest choice of the most appropriate solutions. Every client is unique in their current situation and future financial ambitions, so we create a bespoke plan every time.

"They have a straightforward approach and are very knowledge-able in all areas of advice."

"B&E has made a significant contribution to my financial affairs."

"B&E spent time getting to know me, not just my financial goals and risk appetite."

1. INTRODUCTION

At our first no-obligation meeting, we will construct a detailed breakdown of your current financial situation as well as your short and long term financial and lifestyle goals. Once we have sufficient information, our advisers will be able to propose a bespoke strategy to help you achieve your financial ambitions. We pride ourselves on our client service levels, and are there to answer any questions you may have at any stage. We will be realistic about your targets and transparent about all associated later fees that may apply.

2. PLAN

The plan we put together for you will contain a thorough snapshot of your current financial situation; your aims; and our proposal of how to get there. The in-depth process and analysis we implement will highlight any omissions or areas for discussion, as well as our suggested first steps.

3. SOLUTION

Once we have both agreed on the fine detail of your bespoke financial solution, we will go to market for the most appropriate products to suit your plan, from the best providers. Being independent means we have access to both household names as well as niche suppliers, enabling us to cherry pick the most relevant option for your plan. And don't worry, we do all the annoying application paperwork on your behalf.

4. REVIEW

To continue to meet your objectives, it is crucial that we regularly review your strategy to make sure it is on track. We will do this both behind the scenes and with you present, at your convenience. As your circumstances change over time, so will your financial goals and therefore your plan, and working in close collaboration with you is the only way for us to keep is right up to date. Occasionally, there will be economic or legislative reasons that we may also suggest an amendment to something in your plan, but we would only action this with your full support once you are fully briefed.

A Bespoke Service

"Their expertise and support was invaluable in helping me reach a decision on pension provision that met my objectives."

We believe that there is no one-size-fits-all solution when it comes to you realising your financial goals. Our advisors work with you to truly understand your short and long term aims to tailor an independent, achievable proposal that works for you.

You will have a single point of contact at B&E Financial and unlimited phone or email contact with that account manager, whenever you need them. We treat all clients with the utmost respect and with discretion, regardless of your requirements.

If you would like to arrange a no-obligation discussion with one of our expert advisors, please call 020 7367 5563 today.

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B&E Financial
75 King William Street,
London, EC4N 7BE

T: 0207 367 5563
E: info@bandefinancial.co.uk

bandefinancial.co.uk