Discover the power of combined advice

Comprehensive wealth management provided by expert financial planners and investment managers

Our combined wealth management service can help you meet your goals

Evelyn Partners is a UK leader in wealth management, providing personalised, expert investment management and financial planning advice to support clients in embracing what's next.

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 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.

It's 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

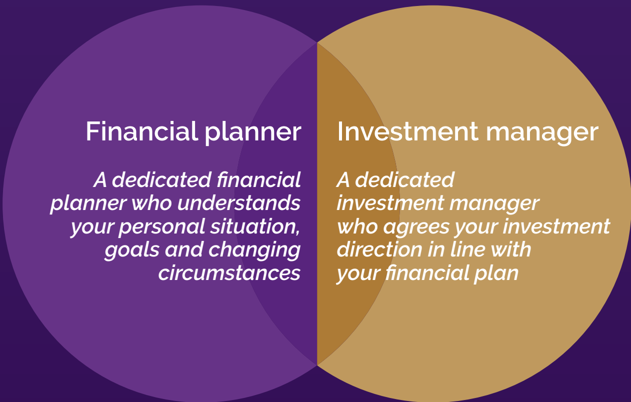
First, we plan your future. We start by turning your life goals into a unique financial plan and review it with you over time.

Your investments

Then, we invest your money in line with your financial goals and attitude to risk, creating tailored portfolios in different tax wrappers where available and suitable, such as ISAs and pensions.

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

The power of combined advice



- Uses 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
- Structures your assets with advice on wrappers held tax-efficiently and manages tax thresholds through investments
- Ongoing reviews of your financial position and objectives

- Builds your personalised investment portfolio using our investment criteria
- Creates a tailored portfolio that ensures your investments are held tax-efficiently in the appropriate wrappers
- Considers direct investments and funds from across the market
- Delivered through Evelyn Partners' range of 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 speak to your usual Evelyn Partners contact, or book an appointment online.

Evelyn Partners recognition 2024:

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Past performance is not a guide to future performance.

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