

# Kellands Gloucester ~ Working with Professionals

*At Kellands Gloucester, we have always worked closely with fellow professionals, such as solicitors and accountants, to help provide their clients with financial planning solutions.*

*Professionals choose to work with us for many reasons.*

## **Our pedigree and track record:**

- We have well over 30 years' experience
- During which time we have established excellent professional relationships
- We work locally but have national coverage and acclaim
- We offer an unrivalled holistic financial planning service

## **Type of clients we specialise in:**

- Company executives
- High net worth individuals
- Owners and directors of SMEs
- Those approaching retirement
- The retired

## **Business areas that we specialise in:**

- Wealth management
- Investment planning and advice
- Pre-retirement planning, Retirement planning, Pensions and Divorce
- Tax planning including Inheritance Tax planning
- Cashflow forecasting
- Life assurance and protection

## **Our access to discounted portfolios and funds:**

Through our excellent working relationships, we have access to discounted portfolios and funds.

These include;

- BMO
- Brewin Dolphin
- Schroders

From a client's perspective, with a fellow professional firm and their IFA working in tandem, they can appreciate the added value that the provision of an all-embracing professional service provides.

*To find out how we can help you and your clients, please contact us on 01684 850088. or visit [www.kelland-gloucester.com](http://www.kelland-gloucester.com)*



**KELLANDS**

FINANCIAL MANAGEMENT CONSULTANTS



Providing specialist financial advice