

A Personal Approach to Wealth Management

Throgmorton is a firm of wholly independent financial advisers. We have built our success upon a reputation for providing top quality, truly impartial advice and service, based upon our expert knowledge of financial markets and taxation.

Our team of highly experienced consultants provide professional advice to our clients across the whole financial planning spectrum, from investments and Inheritance Tax mitigation, equity release schemes and school fees planning to long term care funding, family and business protection and retirement planning.

As independent advisers, our service is completely unbiased. When making recommendations, we select companies for their individual skills, financial strength and their suitability for your personal needs, amongst other factors.

Our expert consultants are located all around the country, so we will almost certainly have an adviser near you to provide you with a local service, whenever and wherever you need it. He or she will be very pleased to meet you and discuss your financial circumstances: your income requirements, tax position and any other needs you may have. Then, using their professional experience and an extensive range of research information, your consultant will complete an in-depth analysis of the whole marketplace and guide you towards the most suitable and tax efficient solution to meet your specific objectives, both now and as your circumstances change, for the future.

A substantial investment in information technology provides us with the ability to provide a comprehensive on-going service to our clients over the long-term. Technology also provides our consultants with research and analysis tools

covering the entire spectrum of UK based and offshore financial products, including technical specifications on every product in the marketplace and supporting information in relation to fund performance, levels of investment risk and the financial strength of product providers.

Our professional advice can help you to make the most of your money – without taking unnecessary risks – and save you tax, giving you the best opportunity to fulfil your aims and aspirations, both now and in the future.

