

# Meet Our Wealth Management Experts

We are a team of highly experienced, fully independent professional advisers who are in the best position to be able to provide a tailored solution for corporate and personal clients.

**Helen Brown**



*Financial Planning Administrator*

**Erica Dietsch**



*Independent Financial Adviser*

**Natasha Fathers**



*Independent Financial Adviser*

**Nigel Smith**



*Director of HWM Limited*

**Matthew Whittam**



*Independent Financial Adviser*

**Qaiser Younis**



*Paraplanner*

## Our Services

### Personal Services

- Personal pensions
- Retirement planning
- Savings and investment
  - Trust planning
- Portfolio management
- Inheritance tax planning
- Long term care planning advice
  - Equity Release
- Life insurance and family protection

### Business Services

- Business protection
- Group pensions
- Auto enrolment
- Financial advice for key business stakeholders
  - Reviews for employees
  - Employee benefits
- Family Investment Companies
- Corporate investments

**Get in touch - First meeting is free**