



WealthBeing

Independent professional support on personal financial affairs

The economic downturn has caused uncertainty within the banks and the investment world. As a result, many high net worth individuals are putting processes in place to monitor and protect their personal wealth. In these increasingly complex circumstances, WealthBeing ensures that clients are kept up-to-the-minute on changes by tracking investments, monitoring interest rates and providing regular financial reports. Our highly tailored service can also extend to independent tax advice and assistance with domicile status, pension planning and trust accounts.

WealthBeing is an entirely bespoke service; the structure is agreed with the individual client, taking into account their requirements. To understand how WealthBeing can work, below is a case study based on an existing client.

Case study

We look after the personal financial affairs of a private equity investor. We track his personal cash and investments and report back to him in an agreed format on a monthly basis. The reports that we produce are tailored specifically to the information that he requires and include an analysis of his income and expenditure under agreed headings. We also hold regular face-to-face meetings and are in daily email contact.

To ensure that our client is maximising his personal wealth we carefully monitor interest rates between banks and ensure that the best available rates are used for his funds.

We are copied in on all emails relating to our client's personal financial matters and a major part of our role is to highlight any

queries or potential errors. In addition to this, our client uses us as a sounding board on general tax issues. This is where our independence from his existing Big 4 accountants proves hugely beneficial. We have been able to offer advice specific to this client on his non-UK domiciled status. In this regard we continually monitor his income paid to and spent in the UK, and track his use of credit cards. We have become part of our client's team and are always available to respond to questions or provide updates.

The service is entirely director-led; our client deals with only one director on all his personal financial matters, ensuring a very personal service. The service is run by a well-established team, meaning that clients can expect continuity in the director that they deal with and the support team.

For a no obligation, exploratory discussion on how we could support your circumstances, please contact:

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