BREWIN DOLPHIN

Cardiff Professional Services Team

Our office provides a range of wealth management services for solicitors, accountants, and their clients.

We specialise in working alongside professional advisers with a shared aim of supporting clients in achieving their long-term financial objectives.

Our **financial planners** consider an individual's long-term financial plans, including the consideration of retirement provisions and estate planning.

Our **investment managers** typically build a client's investment portfolio, and help the client achieve their long-term goals through targeting growth, income or both.

Helping Family lawyers and their clients reach favourable financial settlements

We advise family lawyers on different types of financial settlement, from relatively straightforward cases to complex financial arrangements of high net worth marriages and civil partnerships. This includes:

- Portfolio valuations (Form E)
- Pension valuations and pension sharing order implementations
- Cashflow planning
- Tax considerations
- Portfolio management

Lead advisers:

Greg Tait
Financial Planner

T: 029 2078 0109
E: greg.tait@brewin.co.uk

Rachel Mathias
Investment Manager

T: 029 2034 7824
E: rachel.mathias@brewin.co.uk

Greg heads the financial planning side of our relationship breakdown advisory service, supporting family lawyers and clients during financial remedy.

Rachel is the lead Investment Manager in our Family team, advising lawyers and clients on asset considerations and long-term investments.

Helping Corporate transactions to cross the line

Our wealth managers support business-owner clients and their professional advisers through the financial stages of a corporate deal – from the initial question of 'can I afford to sell?' right through to advising on investing the proceeds post-sale.

A key feature of our support, often through cashflow forecasting, is helping the business owner identify their magic number'. This is the number a business owner requires to fund a future lifestyle following the sale of their business.

Lead advisers:

Adrian Watson
Financial Planner

T: 029 2034 7618
E: adrian.watson@brewin.co.uk

Geraint Hampson-Jones
Investment Manager

T: 029 2034 7822
E: geraint.hampson-jones@brewin.co.uk

Adrian advises business owners on their long-term finances to help meet their future lifestyle needs.

Geraint advises business owners on the long-term investment of funds arising from their business sale.

Personalised wealth management for solicitors and accountants

We advise partners and other staff on a personal basis to build and safeguard their wealth whilst complying with Personal Independence rules.

As well as offering personal advice on pensions, savings and investments, we provide a range in investment platforms to cater for individual financial circumstances.

Lead advisers:

Blair Mullen

Investment Manager

T: 029 2034 7614
E: blair.mullen@brewin.co.uk

Richard Kelly

Investment Manager

T: 029 2078 0122
E: richard.kelly@brewin.co.uk

Blair and Richard are at the forefront of our engagement with professional advisers looking for management of their personal investments.

Private Client financial planning and asset management

We help to preserve our clients' wealth for today's and tomorrow's needs, as well as for future generations.

Building a robust financial plan will usually involve elements of retirement, pension, later life, trusts and investment planning.

Lead adviser:

Adrian Watson

Financial Planner

T: 029 2034 7618
E: adrian.watson@brewin.co.uk

Greg Tait

Financial Planner

T: 029 2078 0109
E: greg.tait@brewin.co.uk

Adrian and Greg lead our Private Client financial planning team.

Relationship Management

As well as providing high-quality wealth management services, we aim to ensure that we share the same values and service requirements as our third-party contacts. In this way we build long-lasting relationships of professional mutual value.

Our relationship management provides a conduit into our specialists and can facilitate introductions to our financial planners and investment managers.

Head of Relationship Management, South West

Matt Still

Professional Services

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E: matthew.still@brewin.co.uk

For information on how Brewin Dolphin Wealth Management can support lawyers, accountants and private clients, visit us at: www.brewin.co.uk/our-offices/cardiff or telephone 029 2034 0100.

Our location: 2nd Floor, 5 Callaghan Square, Cardiff CF10 5BT.

The value of your client's investments can fall and they may get back less than invested. Past performance is not a guide to future performance. If your client invests in currencies other than their own, fluctuations in currency value will mean that the value of their investment will move independently of the underlying asset. No product or service is suitable in all cases, if you have any questions on the information in this document please contact us.