

A close-up photograph of several vibrant green leaves, likely from a plant like a peace lily, with numerous clear water droplets resting on their surfaces. The lighting is soft, highlighting the texture of the leaves and the glistening of the water.

Serenity

Your Financial Life Plan

DESIGN BUILD MAINTAIN

www.serenityfp.com

YOUR Financial Life Plan

Together we will design a completely bespoke financial life plan for you.

A meaningful and clear financial plan with your life and everything you want for it at its core.

We are fully qualified to advise you about every aspect of your financial planning with decades of experience and knowledge.

CLARITY

INSPIRATION

SUPPORT

 Serenity

How do we do it?

YOUR Life

YOUR Money

YOUR Financial Life Plan

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YOUR Life

You will be listened to.

We believe that we don't have the right to advise you about your money if we don't understand you. We spend time to really get to know you.

Our gentle conversations will give you the opportunity and freedom to explore what is most important to you and what gives your life meaning.

YOUR Money

Together we will gather all your financial data and then we will start to collate and crunch all the numbers for you.

You will be advised if what you already have is right for you and what else you should be doing.

Together we will look at your relationship with money and where you might need some additional support.

Finally, you will have your house in order and we will show you how to stay organised.

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YOUR Financial Life Plan

Our financial life planners will skilfully connect everything we know about you to give you a comprehensive, relevant and meaningful Financial Life Plan.

Your plan will give you clarity about where you are now and what you need to do next, with clear advice and guidance from us.

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Your Financial Life Plan will give you answers to all your really important questions, like:

- Will I have enough money to do all the things I want to do?
- What do I need to do that I am not doing now?
- What do I need to change to achieve my goals?
- How can I ensure my money is invested appropriately?
- How can I protect my family?

We will partner with you over the long term so that:

- You stay on track – we will meet with you every year to discuss changes and make any adjustments to ensure everything is going to plan.
- We support you through whatever life throws at you – a trusted relationship that we believe is vital to your success.
- We manage and advise on every aspect of your financial planning so you can relax about it all and focus on what life is really about.
- You feel organised and safe knowing we're here supporting you.
- You make the best of your time and your resources.
- You feel secure in our expertise and advice.

CLARITY
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YOUR Investment for your future

Joining fee

Creation of your Financial Life Plan

Tailored to just what you need from us (starting from £2,500).

Ongoing financial coaching and planning

Maintenance of your Financial Life Plan

A regular subscription starting at £208 per month based on what you need from us, any complexity to your situation and how often you would like to meet.

Implementation of investments and other financial products

One off fee of 1% of the assets we invest for you.

Please refer to our Fee Schedule for examples.


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Get in touch now for a
confidential conversation.

 **Serenity**

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