

Our **TEAM**



James Packer

is a partner in Taylor Vinters and he heads the financial services team. He is a solicitor specialising in private client and tax and trusts work. He also has a background in banking and investment.



Duncan Hannay Robertson

is the senior independent financial advisor. Duncan has nine years' experience in financial services and holds the Advanced Financial Planning Certificate (AFPC). His special interests include comprehensive financial planning, investment portfolio design and inheritance tax planning.



Sallyann Short

is an independent financial advisor providing a wide range of advice on financial planning but specialising in pensions - both for individuals and group personal pensions plans. She holds an LLB Bachelor of Law honours degree, and graduated from law school before going into financial services.



Jenny Ford

is a trainee financial advisor with more than eight years' administrative experience in financial services. Her role within the team is to work closely with Sallyann Short providing administration support, research, analysis and client care.



Simon Fordham

is a trainee financial advisor. His role within the team is to work closely with Duncan Hannay Robertson providing administration support, research, analysis and client care. He has a BA (Hons) in Business & Management.

An Initial Review of Your Requirements

YOU ARE INVITED to let us review your financial planning, to demonstrate how combining our wide experience in personal and family legal services with our financial planning service we can protect and manage your family wealth more effectively.

This firm is regulated by the Law Society and authorised by the Financial Services Authority for investment business.



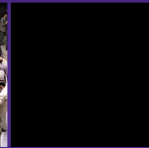
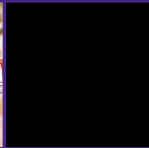
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The
Integrated
Approach
to
PRESERVING
PERSONAL
WEALTH





The Integrated Approach to **PRESERVING PERSONAL WEALTH**

“Turbulent equity and bond markets, proposed limitations on the size of personal pension funds and the use of stealth taxes - these and other factors erode personal wealth.”

IT HAS NEVER BEEN more necessary to develop a personal or family financial strategy to counter such complex and unpredictable economic conditions, and to maintain and review it over time.

Being pro-active in organising private financial affairs is as important as having a disciplined approach to your commercial interests or professional life. For many people, the two are inextricably linked, particularly in owner-managed businesses.

Inheritance planning, investment management, life assurance and personal or family income protection policies all need to be drawn together to create a wealth management strategy that is flexible, long term and integrated.

“Which of your professional advisors is best positioned to provide such a detailed strategy and manage it for you long term?”

Experience

TAYLOR VINTERS has recognised the importance of this type of strategic financial planning from long experience as one of the leading law firms in East Anglia. Advising some of the region's wealthiest families and individuals - both old money and new high-tech wealth - we have established a comprehensive range of legal and financial planning services for private individuals and their families.

Our financial planning team works closely with our specialist tax and trusts lawyers to ensure that you have a cohesive plan for all aspects of your personal affairs. Where appropriate, lawyers from our corporate and commercial practice are also consulted to provide the fully-integrated service for individuals' personal and business affairs.

Empathy

LOOKING AFTER you and your family requires empathy and sensitivity. Our approach is personal and tailored to the specific needs of each client.

Priorities and needs change over the span of a lifetime. Regular review and forward planning will help to ensure that you make the right decisions at each stage of life.

Expertise

FINANCIAL and tax planning lies at the heart of what we do best. Our lawyers and financial advisors are qualified and highly skilled in their different specialist areas of practice.

The lawyers are members of the Society of Trusts and Estates Practitioners. Our financial advisors are members of the Institute of Financial Planning and the Society of Financial Advisors.

Taylor Vinters is a member of Solicitors for Independent Financial Advice (SIFA) and is authorised by the Financial Services Authority to conduct investment business. The firm is regulated by the Law Society. As you would expect, we operate to the highest level of professional expertise and integrity expected of a leading law firm.

PRO-ACTIVE in Organising Private Financial Affairs

Comprehensive Financial Planning

OUR REPUTATION is founded on trust and respect. As lawyers and independent financial advisors (not tied to any bank, insurer or other product provider) our advice is impartial and objective.

Tax advice, wills and trusts, estate planning, property and family advice is available from our specialist lawyers to create and reinforce long-term strategies for individual clients.

Many of our clients are owner-managers of businesses, entrepreneurs, company directors, farmers or individuals with substantial land and property interests. Our comprehensive range of services provides support when personal wealth and tax issues arise out of commercial transactions.

Our Services

WE PROVIDE advice on a wide spectrum of personal, trustee and corporate financial planning. This includes:

- Retirement Planning
- Wealth Management
- Inheritance Tax Planning
- Tax Efficient Investments
- Life Assurance
- Income and Shareholder Protection
- Trustee Investment
- Investment Management
- Group and Personal Pensions
- Stakeholder Pensions
- Corporate Protection.

Working with our dedicated family and matrimonial team, we also specialise in handling settlements and pensions arising from divorce.

WE CAN ADVISE on individual financial products for those wishing to obtain advice from time to time on certain aspects of their financial situation.

Our Fees

WE OPERATE a fee-based service so that all fees and costs are fully transparent and easily understood by our clients. There is no incentive for us to favour certain products or providers because of preferential commission arrangements. Where appropriate initial commissions are rebated in full to our clients, or offset against our fees.

