

CASE STUDY



Mr & Mrs L were referred to us from a Solicitor because their finances were very confusing. Despite accumulating a good level of wealth, even the clients were unsure as to what exactly they had. They held significant amounts of cash which included funds from the sale of property, but were drawing down on the capital every month. Seeing their reserves constantly reducing was uncomfortable for them.

We acted in 3 ways; we helped them consolidate a number of their plans together, we set up an investment portfolio for them to achieve growth, and we commenced taking an income from the portfolio.

The better level of understanding and regular income also meant they discovered they had sufficient capital to make gifts to their children, without harming their lifestyle in any way.

The children have benefitted from their gifts, and the clients are very happy; they understand their newly simplified finances better, their capital is growing rather than reducing, and they have an income each month to live from.

DAVID SCULL
CLIENT SERVICES TEAM LEADER

ALBERT GOODMAN CHARTERED FINANCIAL PLANNERS

