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LAfinancial
Independent Financial Solutions

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LAfinancial - **Our services**

Specialists in bespoke financial planning and wealth management

LAfinancial
Independent Financial Solutions

Introduction

Professional financial advice offers reassurance as well as savings to both individuals and businesses and with active ongoing reviews, opportunities can be taken advantage of which might otherwise be missed. At LAfinancial, our clients rely on this.

As your partner in building wealth and security, we focus on ways in which we can help you to live the life you want to live. By engaging LAfinancial you can assure yourself of regular financial check-ups and access to new ideas from our team.

Choosing a financial partner is one of the most important decisions you will ever make. Take your time and choose wisely.

"I am very grateful for your help and advice, the issues concerned are too complicated for one to manage alone".
Mr R S - Bournemouth

"Thank you for helping us...it is not often that you find people willing to go that extra mile".
Mrs N N - Warminster

LAfinancial Portfolio Review Service – what's included:

- Annual review meeting with your adviser including a complete review of your financial strategy
- Interim review meeting with your adviser including an update of your financial strategy
- Unlimited telephone and email access to your adviser and unlimited face to face access to your adviser between reviews
- Half-yearly valuation reports
- Our professional service provide strategic updates to your accountant and other professional advisers supplying year-end taxation information (as required) and recommending suitable professionals as needs arise ensuring that everyone on your financial team provides advice in a co-ordinated and professional way
- Our portfolio construction service uses a scientific risk-profiling methodology. We design a suitable asset allocation model, portfolio profile and construction and we choose the right investment funds/managers for your requirements
- Portfolio management service includes portfolio monitoring, rebalancing of asset allocation to benchmark (where applicable) written portfolio valuations and ongoing reviews of the funds/managers in your portfolio
- Priority response service – telephone calls and emails returned within one working day.

Additional services

- Inheritance tax and estate-planning service – maximising how much of your estate your beneficiaries will inherit and minimising the impact of inheritance tax on bequests you make
- Tax planning service in conjunction with your accountant and other tax advisers
- SIPP service – value-added strategies using Self Invested Personal Pensions (SIPPs) including specialist advice for clients who own or wish to purchase their own business practices
- Pensions service for retirement planning, pension reviews and pension consolidation.