

TRULY INDEPENDENT | TOTALLY TRANSPARENT

THE  
LAWRENCE  
SCOFFIELD  
GROUP

# WEALTH MANAGEMENT

Looking forward to more from your  
financial future



## WEALTH MANAGEMENT

### HELPING YOU TO EXPECT MORE FROM LIFE

At The Lawrence Scoffield Group we specialise in financial planning for people with higher net wealth, people whose needs and resources are often beyond the scope of conventional Consultants. We provide the specialist skills and knowledge you need to make the most of your financial future, by making the right decisions now.

#### HOW WE WORK

We have an elite team of experienced Financial Consultants who are among the highest qualified in the Industry. They work on a personal basis to create financial strategies to help you achieve your goals.

Our service starts with a face to face meeting, which will help us understand your needs and develop an individual plan to answer them. This will be implemented, and regularly reviewed to ensure your targets are met.

#### WE PLAN TO HELP YOU FULFILL YOUR GOALS

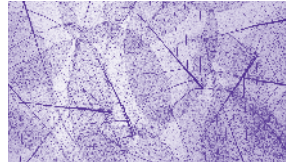
Our service is based on planning. We will work with you to understand you and your life goals, what you want for yourself and your family and the financial implications of these objectives, now and in the future.

We then establish your current position and assess your past and current plans and investments. We then prepare your personal financial plan, taking into account your current situation, and the steps necessary to get your finances to where you wish them to be.

We will present your plan, discuss every step, and implement it on your behalf. In the years to come, we want to work with you to maintain and update your plan to ensure it meets changing conditions - whatever the future may hold.

#### OUR FINANCIAL STRATEGIES MAY INCLUDE

- | Maximising legitimate tax shelter opportunities
- | Providing professional management of assets
- | Advising on Trusts to enhance and protect family and business assets
- | Providing tax efficient methods of meeting school and university fees
- | Ensuring that mortgage and other debts are constructed in the most appropriate way. Ensuring that loved ones are fully protected
- | Mitigating inheritance tax and ensuring assets are passed on efficiently
- | Reviewing investment performance
- | Reviewing debt position, interest rates and whether re-structuring is necessary
- | Reviewing taxation updates, examining threats and opportunities
- | Reviewing pension arrangements taking into consideration changing legislation



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The Lawrence Scoffield Group is a leading firm providing Wealth Management Services and Insurance Solutions to Individuals and Corporate bodies across the UK.



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