



# PLANNING FOR THE FUTURE...

*Sarah Varley* meets Raymond James Investment Services' branch principal Wayne Hayhurst to find out how they are helping people meet their financial objectives and life goals in a very bespoke way. Photography: Phil Garlington

In the heart of Longridge, situated in the old NatWest bank building on the high street, Raymond James Investment Services offers a range of services and capabilities normally only found in big cities.

## *How do you help people at Raymond James?*

We provide high quality, face-to-face, independent advice for individuals and businesses. Having a wide range of experts here in branch allows us to help clients meet their financial objectives and life goals. We help clients grow their wealth, live off their wealth, and pass on their wealth to loved ones. Our key service areas are savings and investments, pensions and SIPPs, tax-efficient retirement income, stockbroking and estate planning.

Our team of 17 in-house specialists enable us to provide bespoke solutions to match our clients' individual financial objectives and circumstances. The specialist roles include:

- Chartered Financial Planners
- Chartered Wealth Managers

- Pension Specialists
- Detailed Cashflow Planners
- Trust, Estate and Later Life Planners
- Investment Analysts
- Stockbrokers
- Discretionary Investment Managers

## *How are you different to other financial advisers and financial services?*

We are able to offer the financial strength, infrastructure and resources of a large multinational financial services company, but with the personable, quality service of an owner managed, local business.

Being regulated and authorised through Raymond James, we have access to world class systems and research and the financial strength of a global powerhouse. Raymond James UK manage around £10 billion of client assets, whilst the parent company, Raymond James Financial manage around \$725 billion globally and have over three million client accounts.

We are financial planners, wealth managers, stockbrokers and have discretionary fund

management permissions, with all this expertise based in Longridge.

We don't subcontract out to other service providers or companies – we have the capabilities, resources and expertise to do everything in-branch.

This allows our clients to deal face-to-face with specific specialists and strips out layers of costs as clients aren't paying several different companies for the solution they receive.

“ MY AIM HAS ALWAYS BEEN SIMPLE – TO BUILD THE MOST TRUSTED AND PROMINENT FINANCIAL SERVICES AND WEALTH MANAGEMENT FIRM IN LANCASHIRE ”

## *Who do you work with?*

Our financial planning and investment proposition is specifically geared up for business owners and individuals with busy or complicated lives or financial arrangements. Due to our bespoke nature, the typical initial investment is from £250,000 to upwards of £20 million. ■

For all your financial planning, get in touch with the team at Raymond James today

## **RAYMOND JAMES®**

Raymond James Investment Services Limited  
8 Berry Lane  
Longridge, Preston PR3 3JA  
01772 780300  
info@rjjswealthmanagement.co.uk  
www.rjjswealthmanagement.co.uk