

PROMOTION

# Raymond James Investment Services, proud to be in the heart of your community



At Raymond James Ribble Valley, we provide bespoke financial planning and investment management for our clients, who are largely based throughout Lancashire. We have a team of 17 people working in specialist roles, based in Longridge, to help our clients meet their financial objectives and life goals.

1 – We help clients discover what

*“We come across a lot of people who take too much risk for their needs.”*

they really want from life, as well as defining clear life goals and devising a plan to achieve these.

2 – We create a financial plan to help our clients meet their life goals, but to also make sure everything is set up tax efficiently.

3 – We create and manage bespoke portfolios tailored to each individual client's needs, to make sure client assets are working as hard as possible, such as generating the income needed.

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 manages £9.4bn of client assets, whilst the parent company, Raymond James Financial manages \$725 billion globally and have over 3 million client accounts as of 31/12/2018.

Given all the upheaval in the industry over the last few years, we see a lot of things that concern us. We come across a lot of people who take too much risk for their needs. For that reason, if there is anyone that you care about, who you think could benefit from a second opinion, we would be glad to help them.

Areas we can help with:

- Savings & Investments
- Stockbroking
- Tax-efficient retirement income

- Discretionary Investment Management
- Pensions & SIPPs
- Estate Planning
- Tax-efficient business funds & exit strategies

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.

Contact us today to book in a free, no obligation consultation to see if you're on track to meet your financial objectives and life goals. ♦



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**RAYMOND JAMES®**

Risk Warning: With investing your capital is at risk.