

# People like you:

Where we provide the most value



Years of experience have enabled us to identify with a reasonable degree of confidence the typical characteristics of the type of client with whom we work best and we know that individuals rarely fit into a convenient 'box'. Common characteristics of some of our clients are shown below:

## Characteristics

- *A current (i.e. still working) or former (i.e. no longer working) business owner, partner in a professional practice or a senior executive;*
- *Working towards, or have achieved, financial independence, although many of our clients choose to continue to working after achieving this (i.e. they work because they choose to do so, not because they must);*
- *Lacking in time, rather than in ability, to manage their own financial planning;*
- *The 'steward/custodian' of the family wealth;*
- *Driven by a desire to help their children and/or other family members financially but not at the risk of de-motivating them;*
- *London-based, or have reason to visit London on a regular basis;*
- *Willing to delegate;*
- *Have interests outside work;*
- *Looking for a collaborative and long term relationship with their planner.*

## Common issues

We tend to find that our clients face a lot of the same issues. Consequently, over the years we have built up a tremendous amount of experience in helping our clients to deal with those issues *en route* to achieving their lifetime goals. Here are some of the issues that we specialise in solving:

- *Allowing clients to focus on those aspects of their life which matter most to them in the knowledge that their financial situation is under control and need not absorb their continual attention;*
- *Helping clients to understand how much they can spend each year without running out of money before they run out of life;*
- *Helping clients to answer the question, “What investment return do I need to achieve my goals and is that consistent with the risk I am willing and able to take?”, using a lifetime cashflow forecast to help them to determine how much they might, for example, need to realise from the sale of a business to meet the cost of their lifetime goals;*
- *Helping clients to determine when they will be able to choose to work as opposed to it being necessary;*
- *Helping clients to simplify their finances and consequently reduce their stress;*
- *Helping clients to minimise the tax that they or their children will pay, if that is important to them;*
- *Helping clients to avoid financial surprises;*
- *Helping clients to leave their children enough to do something, but not enough to do nothing;*
- *Protecting clients from investment ‘opportunities’ which can sound fantastic on paper but which often contain hidden risks;*
- *Acting as an independent third party sounding board to help clients to evaluate alternative options.*

## Could this be you?

It is very likely that some of the profiles and issues affecting clients we have already apply to you. If they resonate why not start a conversation?

## Contact details

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