



6 key values that financial planners provide

Partnership



Organisation



Accountability



Objectivity



Proactivity



Education



1 Partnership:



Bloomsbury works collaboratively with you, not just for you, to help you to achieve the best life possible; we take time to ensure that we have a clear understanding of your background, philosophy, needs and objectives whilst ensuring that our fees represent good value for you.

2 Organisation:



Bloomsbury helps to bring order to your financial life by structuring your financial affairs efficiently at both the macro level of investments, insurance, estate, taxes etc. and also the micro level of household cashflow.

3 Accountability:



Bloomsbury helps you to follow through on financial commitments by working with you to prioritise your goals, identify the steps that you need to take and regularly review your progress towards achieving them.

4 Objectivity:



Bloomsbury brings insight from the outside to help avoid emotionally driven decisions in important money matters by being available to consult with you at key moments, doing the research to ensure that you have all the necessary information and disclosing and managing any of our own potential conflicts of interest.

5 Proactivity:



Bloomsbury works with you to anticipate major changes in your life and to prepare for them financially by holding regular reviews and creating the necessary action plans to address and manage them ahead of time.

6 Education:



Bloomsbury explores and identifies the specific knowledge that will be needed in order for you to achieve your goals; by thoroughly understanding your situation we are then able to explain the options and risks associated with each choice and to provide the necessary resources to facilitate your decisions.

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