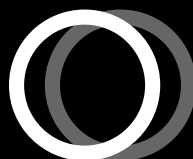




Fee-Based Independent Wealth Advice



Philippa Gee  
Wealth Management

[info@philippagee.co.uk](mailto:info@philippagee.co.uk)  
01694 722 222

## To build, manage & protect your wealth

Will I have enough money to retire comfortably?

How do I protect that which I have built up?

How do I pass on my wealth to future generations?

Am I on the right track?

Quite simply, what do I do now?

Everyone has a financial question. Some are specific, some wide-ranging. We're all different, which is why our questions are unique.

At Philippa Gee Wealth Management we recognise different questions demand different answers. And when those questions concern your future – and perhaps the futures of those close to you as well – only expert answers will do.

Our approach is confidential, effective and, above all, client-focused. Financial advice shouldn't be a 'one size fits all' philosophy. We pride ourselves on delivering a service tailored to suit your individual needs, whatever they may be.

Nowadays there are more than enough ways to add to your financial worries. By giving you the answers you need, we can help you reduce them. For a change.

Why not get in touch? You can send us an email at [info@philippagee.co.uk](mailto:info@philippagee.co.uk) or telephone us on

**01694 722 222**

**Philippa Gee**  
**Managing Director**

Whether you're looking to maximise your investments, trying to get the very best out of your pension or just seeking some general advice, we can help you plot a path through the financial maze.

**Waste not, want not**

Some **33%** of those retired in the UK worry about money.  
(Survey for [www.alzheimersresearchuk.org](http://www.alzheimersresearchuk.org), February 2011)

The nation's savers could waste **£509m** by not investing tax-efficiently.  
(Survey for [www.unbiased.co.uk](http://www.unbiased.co.uk), March 2011.)

UK taxpayers are set to waste **£1.3bn** due to poor Inheritance Tax planning in 2011 alone. (Survey for [www.unbiased.co.uk](http://www.unbiased.co.uk), April 2011.)

These are just three examples of why it's vital to put our finances in order. With so much to lose – including peace of mind – it's clearly a job worth doing well.

More information than ever is freely available to the DIY financial planner, but in our experience there comes a time when professional guidance is essential. As with many DIY tasks, you might start out with the best intentions but then lose interest or, worse still, see your work fall apart in front of you.

**That's why choosing an Independent Wealth Adviser is one of the most important decisions you'll ever make.**

## An approach you can rely on

A good Independent Wealth Adviser has many qualities, but we believe two in particular help mark out the very best.

### 1. Independence

Advisers need to be free to select the most appropriate products to suit your needs. They can't do that if they're tied to any one company.

### 2. Fee-based pricing

The Financial Services Authority is committed to making commission-based advice a thing of the past. From 2013 all financial advisers who want to call themselves independent will have to work on a fee basis.

The reason for this is simple. Some products pay 0% commission, others 7% or more – so some advisers end up getting paid for the products they sell rather than the advice they give.

Philippa Gee Wealth Management is genuinely independent and uses only a fee-based structure.

We wouldn't have it any other way.

Nor would our clients.

# we only work on a fee-basis



**Experience of wealth, a wealth of experience**

We have decades of experience in providing expert financial solutions on both a personal and corporate basis, from dealing with investments to addressing retirement issues and beyond.

Our clients range from highly sophisticated investors and the significantly wealthy to smaller investors who may require only the financial equivalent of a helping hand. Whatever our clients' needs, we deliver solutions specially tailored to suit them.

Philippa herself has a significant profile and is well known throughout the UK investment community. As well as being widely respected for her wealth management skills, she has provided financial comment and views to the media for 15 years, regularly appearing in print and on radio and television.

## Whatever suits you

In keeping with our fundamental belief that different financial questions demand different answers, our process is as flexible as possible.

Only the first stage is always the same. Our initial meeting with you is free.

After that, should you choose to proceed, it's a case of what suits you best.

You can decide to receive advice on an ongoing or one-off basis. Most clients have neither sufficient time nor energy to devote to their financial affairs and therefore opt for ongoing advice, but some prefer us simply to carry out an occasional "health-check".

Should you choose ongoing advice, you can specify the frequency with which you'd like to receive updates on your financial situation. However regularly you prefer them, you can rest assured that we're constantly monitoring world and market events.

You can ask to be kept up to date via phone, email or post or in face-to-face meetings. Although we prefer the latter, we appreciate our clients live busy lives. Whatever method you choose, we'll make sure you're fully informed.

Your needs are paramount.  
Solutions have to be specific.  
So do services.

**The next step**

We're not here to pressure you.

Visit our website if you'd like more information.  
Give us a call. Visit our offices for a talk.  
But take your time.

Whatever you're comfortable with and whatever suits you best — that's what we're here for, after all.

Philippa Gee Wealth Management

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Paradigm House, Brooke Court, Wilmslow, Cheshire SK9 3ND which is authorised and regulated by the Financial Services Authority.