DANIEL BLOOMFIELD
WEALTH MANAGEMENT

Executive Service

Daniel Bloomfield Wealth Management provide a comprehensive range of assistance and support to senior executives and professional clients. We understand your personal and professional lives are often intertwined, so we deliver a cohesive strategy that incorporates all aspects of your life. Our service is tailored to your specific needs and includes the following:

REGULAR MEETINGS

We realise you will want to be seen regularly, the only question is how often. At the beginning of each year we mutually agree a meeting schedule with all of our executive clients, locking in key dates and timing.

KEEPING YOU INFORMED

During times like these clients have told us they would like to stay close and be kept informed on a regular basis, so that's exactly what we do.

We know you are busy, so we act as your eyes and ears and only get in touch when something affects you directly. All communications will be short, sharp and to the point – no fluff.

ADVISER ACCESS

If you need to contact your adviser between review dates we are available via a range of communication options, including:

- Telephone
- Email
- Text
- Zoom
- LinkedIn

> "Don't worry if some of these new-fangled options aren't for you. We're still happy to speak to you on the phone or face to face at any time."
>
> **Daniel Bloomfield, Financial Planner**

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How much is enough?

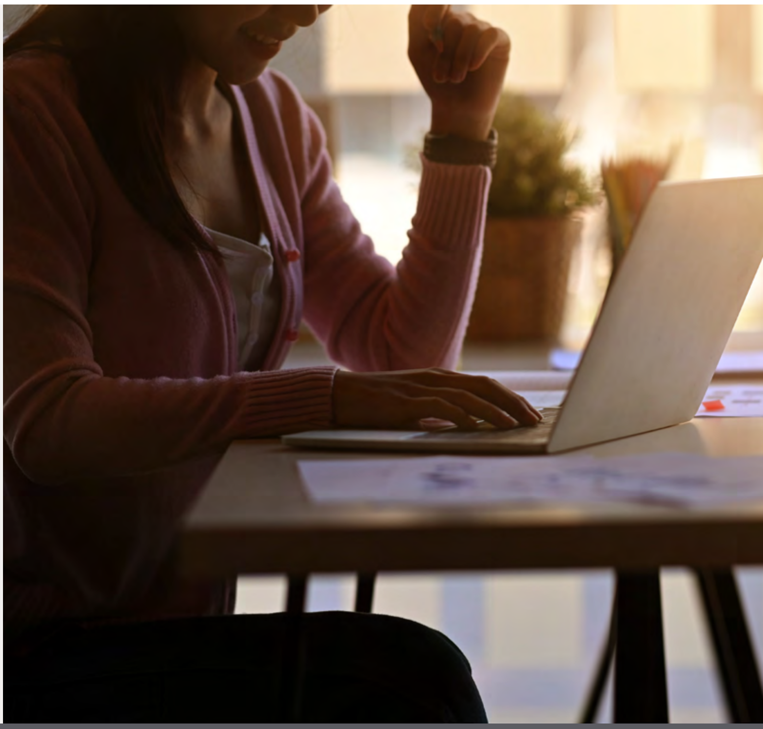
It would be nice to know how much money you need to retire, semi-retire or simply achieve financial independence. You may even have an idea yourself but would like an expert to confirm if you are on the right track and to ensure you haven't missed anything.

We can not only do those calculations for you from time to time, but we can also provide you smart strategies that may:

- Bring forward the date
- Change your view of what a move to retirement looks like
- Give you the confidence to re-negotiate your contracts at work, extending or improving your working life (if that is what you want)

"Everyone has a number. Each individual is unique and their number will differ depending on their lifestyle, dreams or ambitions. Our job is to help clients to find their number, then create a strategic plan to help them to achieve it."

Daniel Bloomfield, Financial Planner



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Working with your other advisers

If you already have other professional advisers in place, it is essential your financial adviser is able to fit in and work with them effectively. We have a great deal of experience working with other professional advisers including accountants, lawyers and corporate financiers.

THE PROFESSIONAL NETWORK

If you do ever need another professional to deal with a specific issue, we have an extensive and trusted network of contacts we can connect you to. Members of our professional network have been hand selected for their complementary skills and expertise. With our guidance they will work together seamlessly to manage all aspects of your affairs.

These services are separate and distinct to those offered by Daniel Bloomfield Wealth Management and St. James's Place and are not regulated by the Financial Conduct Authority.

"We realise that your financial concerns cannot be dealt with in isolation, that's why we work with an expert team of professional advisers to provide guidance on all aspects of your affairs as both a business owner and private client."

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Dealing with broader family financial issues

As an executive we understand the issues that affect you, both personally and professionally. We also realise that sometimes members of your family face challenges, which you would like to help them through.

These could include the following:

- Care home funding for your parents
- Paying for education, for children or grandchildren
- Help with property purchase or debt reduction for your children
- Gifting money safely, down through the generations

We provide advice on each of these matters, as part of our business owner advisory service. Further inclusions in this service are described below.

WEALTH ADMINISTRATION: REMOVING THE HASSLE

Our aim is to simplify everything that can be simplified, speaking to you in a way you can understand without any jargon. We will take on as much or as little as you want us to – it is entirely up to you.

RETIREMENT PLANNING: PENSIONS ADVICE

Pensions are extremely tax effective but unfortunately, they are also very complicated and confusing. We can guide you through the pensions minefield, keeping it clear and simple at the same time.

TAX MITIGATION & PLANNING

Every bit of tax saved goes straight into your pocket. Some smart tax planning can make your money last longer and provide you with more options as you approach the end of your working life.

INVESTMENT ADVICE: MANAGING RISK AND REWARD

Our investment approach is straightforward and sound. Most clients have worked hard to accumulate what they've got and don't want or need to be taking too much investment risk, so we create a plan tailored to you and your specific needs.

IHT AND ESTATE PLANNING: PROTECTING YOUR ASSETS

When it comes to estate planning you want to ensure the right funds end up in the right hands at the right time, without paying unneccessary tax to the government. Drawing on our years of experience and trusted network we can deal with your estate planning and IHT issues in a way that meets your exact requirements.

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ONGOING ADVICE CHARGE

We will discuss with you the ongoing advice charges for our services. Our advice is not free. Details of the charges we make for our advice and how it is paid for are set out in the 'Key facts about our costs and services' document you receive. The cost for our advice is paid for and facilitated out of the overall charges levied on your investment. The advice charges will also be discussed with you and the specific amount charged will be provided on your personalised illustration. If you have any questions regarding this, please do not hesitate to contact us.

GUARANTEED ADVICE

To provide you with added peace of mind and reassurance, St. James's Place guarantees the suitability of the advice given by members of the St. James's Place Partnership when recommending any of the wealth management products and services available from companies in the group, more details of which are set out on the group's website at www.sjp.co.uk/products.

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