

TAYLOR & TAYLOR  
ASSOCIATES

INDEPENDENT FINANCIAL ADVISORS

T&T

# About Taylor & Taylor Associates



Taking financial advice could be the most important thing you'll ever do for yourself and your family. It can save you money, make you money, protect your finances, and most importantly prepare you for whatever life has in store.

Taylor & Taylor Associates Ltd have been providing comprehensive financial advice for over a decade to clients across Norfolk. In addition to our experience in the industry, our advisers are also qualified and authorised fund managers.

We have built our reputation on providing professional, honest and accurate investment and pension advice to our clients. Our consistent reviews with our clients through the good times and the bad times is testimony of our dedication to our clients.

We pride ourselves on the professional service we deliver to our clients and understand the importance of customer care and attention to detail. We provide financial advice on all areas with each case being unique and bespoke to cater for individual client requirements.

'Our Philosophy' is to see your perception of your future and with holistic financial advice work together to create it.

- To engage you in something you are unengaged with at present
- To ensure your financial portfolio is managed to a high standard
- To build a strong and open long term relationship
- To ensure you receive proactive guidance on all your financial requirements

## Meet the team



**Alan Taylor**  
Adviser



**Russell Taylor**  
Adviser



**Kelly Elliff**  
Client Account  
Manager



**Victoria Harris**  
Business  
Support  
Manager



**Vicki Hood**  
Office  
Manager



**Ocean Taylor**  
Marketing  
Manager



**Rebecca Taylor**  
HR Manager



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[www.taylorandtaylorassociates.co.uk](http://www.taylorandtaylorassociates.co.uk)  
T: 01603 783200

Financial House, Tilia Business Park Hoveton, Norfolk NR12 8QN

# Our clients

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Understanding individual clients' lifestyles and needs is key to establishing long term successful relationships which deliver what the client requires, when he or she wants it. We know that our reputation for delivering relevant and bespoke services works as our customer base continues to grow by referral. Our existing customers define how we grow by choosing whether to recommend us to their friends and colleagues.

We are always looking for new ways to improve on the service we currently offer and to grow and develop to ensure we receive up to the minute financial information on the markets while ensuring our client's financial needs are at the forefront of our minds at all times.

Anybody who already knows Taylor & Taylor Associates will understand how attention to detail and our friendly approach are paramount to us.

## Testimonials

*"Having our own businesses and a young family, means that having a Financial Advisor who understands our needs, is very important to us. We are very pleased with the service and friendly approach we receive from Taylor & Taylor Associates. We rely on them to keep our financial situation in check so that we are able to concentrate on the day-to-day running of our businesses. We have therefore recommended them and would have no hesitation in doing so again."*  
**Mr & Mrs Gardner**

*"I always used to use my bank for savings and investing, but was recommended to Taylor and Taylor associates 18 years ago and have not used my bank ever since. Through the advice I have had from Taylor and Taylor associates my money has grown by about 8% each year. I have in the past and will continue to recommend their services."*  
**Mr Ralph Deary**

## We provide our clients:

- A reliable service; we are not a sales determined business, our success is based on the level of service we provide our clients.
- An independent and bespoke financial planning service.
- Daily support and assistance from our dedicated team.
- Option of an Advisory or Discretionary management service.
- Newsletters, online information and services to assist and keep you up to date with the company and investment market developments.



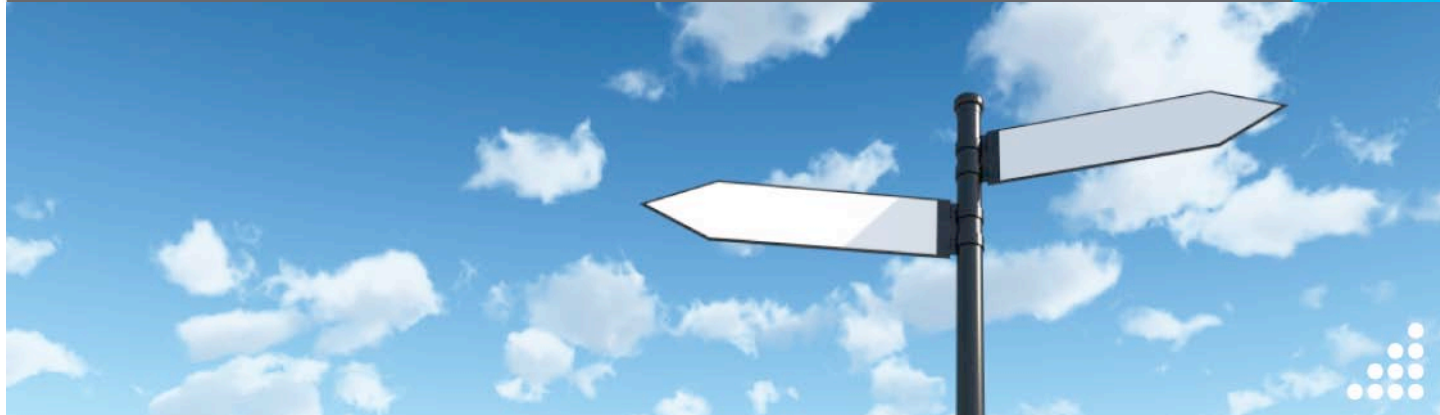
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# Our services

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**We provide advisory services in the following areas for both Private and Corporate clients:**

## Pension Planning

- Stakeholder pensions
- Personal Pension Plans (PPPs)
- Self Invested Personal Pension Plans
- Employers Schemes (Occupational Pensions)
- Group Personal Pension Plans

## Retirement Planning

- Annuities
- Phased Retirement
- Pension Fund Withdrawal

## Generating Growth & Income

- Bespoke investments
- Savings planning
- Investment strategy
- Regular reviews
- Discretionary management

## Protection

- Tailored for:
  - Individuals
  - Families
  - Companies



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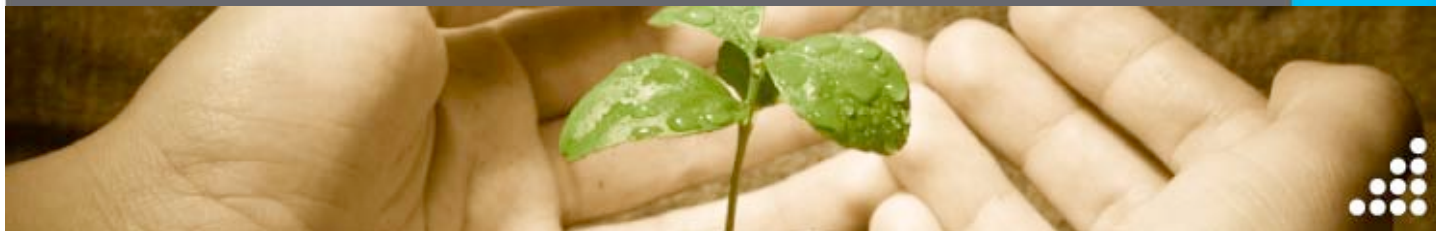
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# Online financial review

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## For those who need financial help or reassurance but don't have time for a face to face meeting....

At Taylor & Taylor Associates, we are not interested in sales; we are interested in service. In particular providing the best financial planning advice possible to ensure you are maximising your pensions, savings and investments and heading in the right direction to achieve the financial security you have always desired. To give you the opportunity to take a completely fresh look at your financial situation we have created an online financial review platform where your finances are reviewed by a fully qualified financial adviser at our office on a no obligation basis.

For a one off fee of **£250** you will receive a detailed 10 page review on every part of your financial state, detailing your situation at present, recommendations for improvement and suggestions from one of our advisors to ensure that together we achieve your goals.

### Benefits:

- You know in advance exactly what it will cost and can see an example online of what you will receive.
- The information you receive is unique and bespoke to your financial situation.
- All advice given is unbiased and not dependent on meeting sales targets.
- The Financial Review will give you a detailed overview along with suggestions of any changes you might want to consider that would be beneficial to you and your family's financial future.

Ultimately, the report will give you an independent review to give you peace of mind, knowing you are on the right track.



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# Our charges

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## The cost of our services

Taylor & Taylor Associates can be remunerated for services solely on a fee basis, paid directly from the client or deducted directly from your pension or investment fund or in some cases via an additional charge on your investment allowing us to be remunerated by a commission payment.

Irrespective of which method you prefer to remunerate us, Taylor & Taylor Associates will charge accordingly to the time involved in making the initial set up of a suitable portfolio of protection, pension and/or investment for our clients. To ensure we charge our time fairly we maintain time sheets for every client dealing, we can then agree with the client which option is best for them.

## Fair and motivated structure

We have always considered the fairest charging structure for a firm advising on investments and pension funds to be one linked to the success of the financial guidance we provide. This also covers the cost of our regular reviews, meetings or general queries.

Therefore we will make an annual percentage charge varying from 0.5% to 1.0% (depending on the complexity of the investment or pension fund), on the value of your investment, and this is usually paid directly from the investment house. This means we are integrally linked and have a vested interest in helping your pension and/or investment portfolio to succeed.



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