Genus

Affinity Genus™ is our standard comprehensive wealth management service designed for those with investible assets of £500,000 or more.

Its key features are the development and maintenance of a fully Integrated Wealth Management Plan™, regular objective based progress meetings and fully pro-active management of your financial arrangements. In order to maintain quality standards and because of the depth and nature of the work involved, we currently restrict the number of new Clients we take on for this service to 36 per year.

Core features of this service include:

At Outset:

- The Big Picture – Getting to know you and establishing your priorities, objectives, desires and any concerns you may have in relation to money and your future
- The Detailed Stuff – Initial information and data gathering, research & analysis
- Where Are You Now – Development of your personal initial Cash Flow Forecast and "What If "scenarios
- The Plan – Development and production of your own personal Integrated Wealth Management Plan™ and associated reports
- Implementation – Putting in place any new financial arrangements that may be required
- Clarity – Production of your bespoke Personal Vision Blueprint™, Financial Strategy Roadmap™ and Total Clarity Map™.

Ongoing:

- Keeping things on Track
- Annual Progress Meetings
- Provision of our Standard Integrated Ongoing Services™
- Maintenance of your personal Cash Flow Forecast and "What If" scenarios
- Maintenance of your bespoke Personal Vision Blueprint™, Financial Strategy Roadmap™ and Total Clarity Map™.
- Access to our Legacy Guidance Service™
- Access to our third party legal experts for ongoing advice and reviews of Wills, Trusts, Estate Planning measures, Powers of Attorney etc
- Priority access to Client briefings and appreciation events
- 25% discount on New Advice Event Fees.

Affinity

INTEGRATED WEALTH MANAGEMENT