

Genus Plus

Genus Plus™ is our Platinum comprehensive wealth management service designed for those with investible assets of £2 million or more.

It is designed for those with more complex affairs, generational wealth planning issues, multiple business structures and significant potential tax liabilities. 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 12 per year.

In addition to the core features of the Affinity Genus service, our Genus Plus clients can also expect to receive the following:

- Twice yearly Progress Meetings
- Optional full Third Party Discretionary Fund Management Solutions.
- Cash Management Service
- Generational Wealth Planning exercises and advice
- Beneficiary and Trustee Wealth Planning exercises and advice
- Access to Exclusive Client briefings and appreciation events
- 50% discount on New Advice Event Fees.

Affinity

INTEGRATED WEALTH
MANAGEMENT