

expert independent
advice to guide your
financial future

pensions | savings and investments | mortgages | protection

platinum
INDEPENDENT FINANCIAL SERVICES



working with you throughout life's journey

Navigating financial options can be challenging, gain peace-of-mind and make most of the opportunities available with expert independent advice.

At Platinum, we offer independent financial services and pride ourselves on providing a friendly and accessible service centred around understanding your values and ambitions.

Our specialist advisors are here to explain your options and manage your portfolio, leaving you free to concentrate on life.

Whether you're looking for short, medium or long-term support, we can assist you on every step of your journey.



the benefits of an independent adviser

At Platinum, we take the stress and risk away from making life-changing financial decisions.

If you want to get your finances in order, identify your goals for the future, and set up a plan to help you achieve them - you may want to talk to a financial adviser.

If you organise your own finances there is a risk that you might lose money or buy a product that is not suitable for you because you don't have the knowledge or understand it thoroughly. It is also worth bearing in mind the cost of fees against the financial and emotional cost of getting it wrong if you buy without taking advice.

It is really important to consider the 'value of advice', not just in monetary terms but also for its role in bringing greater certainty, reducing stress and saving time.

At the heart of our process is getting to know you and your aspirations, in order to identify the right products to match your goals.

With specialist expertise and experience across a wide range of services you can take comfort in knowing that we will comprehensively care for your financial future.

Working closely with your accountants and solicitors is all part of our inclusive service.

Take assurance in having a qualified team of professionals on your side.



pensions

There are many ways to support saving for retirement and understanding everything from taxation to investment can get complicated.

At Platinum, we'll explain, recommend and monitor your pension portfolio for you, giving you peace-of-mind that you're taking the right steps to protect your future.

mortgages

Buying property can be the most joyful and the most stressful experience you can go through.

Our specialists know the market and can ease the strain by sourcing the most suitable lender offer for you.

savings and investments

Whether you're saving for something special or looking to protect yourself and your family against unexpected events, it's crucial to keep aware of your savings and investment options.

We're here to help you navigate volatile markets and make sure your money continues to work for you.

protection

There are various insurance options available to protect yourself, your family and your business from the unexpected and undesirable.

We'll take the time to understand you and your budgets before advising you on the most appropriate policies.

the advice process

1 - initial meeting

When we meet a client for the first time, there is no charge for this meeting. You'll learn how we work, our ethos and our fees, and we will find out more about your requirements. It is an opportunity for you to ensure we are the perfect match for you. This meeting typically takes 60-90 minutes and can be held at our office, your home or your place of work.

2 - information gathering

Detailed data gathering, including investigating your existing policies and arrangements will give us an accurate picture of your current financial situation. We will also help you identify your goals, define your timeframe and understand your attitude towards investment risk.

3 - analysis

With an understanding of your current circumstances, we will then assess this against your objectives and your approach to risk, researching all relevant opportunities to develop solutions on how best to achieve your goals.

4 - recommendations

We will present and explain our recommendations to you, suggesting a mix of products and services suited to your needs.

5 - implementation

Once you have reviewed the options and are happy to proceed, we will manage the implementation of our recommendations.

6 - monitoring and review

We will regularly review your plans so that we can make the necessary alterations to adjust your financial planning as your circumstances change. This ensures you remain on track and we monitor investment performance going forward.

Secure your financial future

Your initial review meeting is at no cost to you and without obligation so you can assess whether we're the right fit for you and your needs.

Once we understand your requirements, we will explain any future costs, and never undertake chargeable work without your consent.

We will supply you with our Client Agreement which outlines costs and our regulatory permissions in detail.

Read our 5* reviews on Google  

www.platinumifs.co.uk

Platinum IFS - 211 Marsland Road, Sale, M33 3ND

Book a review meeting

Call one of our friendly advisers on

0161 718 8328

to secure your no charge, no-obligation review meeting

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