

PRIVATE CLIENT



“ A brand new
approach
to managing
wealth ”

INTRODUCTION

Stop. Think. Am I going in the right direction? Everyone asks the same question, from time to time. And when it comes to making your money work for you, finding the right answer is often confusing.

But, at Price Bailey, we don't think it has to be.

We have been providing tax and financial advice for over 70 years, but firmly believe we can exceed your expectations with a brand new approach to managing wealth. This exciting new approach is extremely simple to use, so we gave it a simple name: **Price Bailey Private Client**.

Our strategy is to bring together your financial aspirations, concerns and responsibilities and give you as much control as you want over your finances.

Comprehensive financial planning, tax advice and wealth management, all provided by one key adviser who can co-ordinate everything for you under one roof.

This one-stop shop approach is a truly bespoke service from one of the leading firms of independent chartered accountants.



AMBITIONS

Opportunities, challenges, trials and triumphs. Life is full of them.

But like you, we at Price Bailey Private Client understand that to realise your ambitions, and fulfil your potential, you have to make the most of your money.

We know that you're juggling the demands of today, and your hopes for tomorrow. You need to find the right balance.

So, one of the first things we'll do is to get to know you. We'll discuss your objectives, in the short and long term. We'll find out where you are now, and where you want to be.

And, together, we'll start mapping your future.

“ *Realise*
your
ambitions,
& *fulfil*
your
potential ”





THE SERVICE

Why is it that personal financial planning is sometimes so impersonal?

Wouldn't it be reassuring to know that someone is looking out for you, safeguarding your interests, and ensuring you can reap the rewards of your investments and hard work?

Someone always on hand with expert advice, someone with a real understanding not merely of your money, but also of the life you want to lead with it. Our Price Bailey Private Client advisers are here to do just that.

You'll have review meetings at least twice a year to help you maintain your desired lifestyle, and you'll be able to discuss things whenever you like, on the telephone, or by e-mail.

“ Looking
out for you,
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interests ”





PLANNING

Sometimes in the world of finance, it's swings and roundabouts. Markets have their ups and downs, and none of us can truly predict the future.

But with the sound planning and strong two-way partnership that lie at the heart of the Price Bailey Private Client service, you can be sure of the best possible advice to enhance your portfolio in uncertain times. We can provide the flexibility to react swiftly to changing circumstances.

We've set things up so you can keep in constant touch with how we're managing your money. But, if you'd rather let us act on your behalf, without the need for reams of paperwork, we can. So it's your choice to be as hands-on or hands-off as you want.

“ Enhance
your
portfolio
in uncertain
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TAXATION

Rules, red-tape, form-filling. Keeping your personal records and tax returns in order can be a bewildering, time-consuming and stressful experience.

Sometimes it's just not possible to keep abreast of the twists and turns of tax law, and how often have you been left with the nagging feeling that you may have lost out, or paid too much?

Not any more. As a private client, you'll have one-to-one advice from experts with unrivalled experience in the field. Your adviser will guide you through your tax return, making sure it is completed properly, and promptly.

All our experts are qualified to the highest levels, and undergo regular training to keep them up to date with the latest tax regulations. You have the confidence of knowing that your records are in good hands, and that everything is taken care of.

To find out more about Price Bailey Private Client, contact James King on 0800 434 6460 or email privateclient@pricebailey.co.uk



Price Bailey Private Client. The right advice for life.

OTHER PRICE BAILEY SERVICES

We have dedicated general practice teams for:

Small Business – Informing, developing and supporting SMEs

Corporate – Enabling, guiding and optimising businesses

CONSULTANCY SERVICES

With our consultancy services we can create significant improvements in value.

Business Strategy – Help with growth and profits

Corporate Finance – Buying and selling businesses, valuations

Employer Consulting – Helping you as an employer

Tax Consulting – Help with complex business and personal tax issues

Business Systems – From simple accounting software to whole business systems

To request a copy of our General Practice or Consultancy Service brochures call 0800 434 6460.

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