



COTSWOLD WEALTH

CHARTERED FINANCIAL PLANNERS

www.cotswoldwealth.co.uk

*Financial advice and Wealth Management
that lasts a lifetime...
...and beyond*





Jennifer Hill

Managing Director of Cotswold Wealth Chartered Financial Planners

“We established the business in 2013 to offer a relationship based financial advice service. We believe that high-quality face-to-face financial advice should be accessible to everyone.”



Highest standard of accreditation

At Cotswold Wealth Chartered Financial Planners, we place our clients at the heart of our business. We believe that building truly long-term relationships is the best way to provide quality personal financial and investment advice.

Cotswold Wealth Chartered Financial Planners has been awarded the prestigious Chartered Financial Planners designation by the Chartered Institute (CII). This is the industry’s gold standard for firms of financial planners. It confirms that we have satisfied rigorous qualification criteria by retaining highly-qualified staff who subscribe to the membership conditions of the CII. Only the UK’s premier financial planning firms qualify for Chartered status, so you can be confident that you are dealing with a leading business that is wholly committed to providing you with the best possible advice, service and support.

As Chartered Financial Planners, and a SOLLA accredited Practice, we focus on providing holistic advice of the highest quality to individuals, trusts, charities & businesses with the core objective in assisting our clients with making informed and intelligent financial decisions to secure your financial future.

Our services

We offer wealth management advice to individuals, trustees and businesses with the aim of helping our clients to create a structured financial plan. Our services include:

Building and Preserving Capital	Borrowing Money and Borrowings	Financial Protection
Stock Broking services *	Equity Release for the over 55 ‘s [^]	Specialist Insurance
Saving or Investing	Mortgages	Employee Benefits
Trust and Estate Planning		Long-Term Care
Pensions and Retirement Planning		Health Insurance
		Life Assurance, Critical Illness & Sickness cover

Your home or other property may be repossessed if you do not keep up repayments on your mortgage.

The value of an investment with St. James’s Place or Rowan Dartington may fall as well as rise. You may get back less than the amount invested.

[^]Equity release is a lifetime mortgage or home reversion plan.

To understand the features and risks associated with such products, please ask for a personalised illustration.

*Through Rowan Dartington, the stockbroking arm of St. James’s Place.

Trusts are not regulated by the Financial Conduct Authority.



VIEWS FROM A CLIENT'S PERSPECTIVE

"Cotswold Wealth gave me excellent advice on my pensions, advising me on all the difficult options I had, making sure I understood everything. Nothing was too much trouble and I found them very friendly and approachable. I have already recommended them to friends and family who intend to use them in the near future."

Peter Townsend, Engineer, Tetbury

"We were delighted with Cotswold services. Jennifer provided excellent in-person advice. She took time to understand our needs and financial situation and clearly explained her advice, She implemented her advice promptly and professionally, meaning our financial affairs are now much simpler."

Sheila Sharma, Retired, Wimbledon, London.

"Jason of Cotswold Wealth has been advising me for the past 5 years in respect of my St. James's Place investments. As a teacher hoping to boost my pension as I approach retirement, I have found his management and advice in respect of my portfolio both professional and friendly. He has been extremely proactive in his interactions and forthcoming in his honesty."

Michael Collier, Teacher, Thames Ditton Surrey

"Cotswold Wealth have advised me on financial matters for a number of years. I have sought specific advice on investing for the benefit of my Grandchildren, and this has been particularly helpful. In addition, the information I receive on the progress of the portfolio is timely and useful. Finally, the certificates necessary for tax self assessment are always received punctually. Overall a very efficient service."

Dr Nigel Moor, Moreton-in-Marsh

Partner Practice

**St
James's
Place**

About St. James's Place

Our clients have the comfort of knowing that Cotswold Wealth Chartered Financial Planners is a Partner Practice of St. James's Place, an award-winning FTSE 100 business with funds under management in excess of £153 million and is well established as one of the UK's leading wealth management organisations.

Together we specialise in meeting the financial needs of people who may have created significant capital, or who earn higher incomes, and whose circumstances are therefore more complicated than most.

St. James's Place Wealth Management Awards 2022





Where to find us:

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Meeting at offices is by appointment only

www.cotswoldwealth.co.uk

The Partner Practice is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website www.sjp.co.uk/products. The title 'Partner Practice' is the marketing term used to describe St. James's Place representatives. Cotswold Wealth Chartered Financial Planners is a trading name of Cotswold Wealth Solutions Ltd.