

Wealth Management

Getting the right advice

With an ever changing tax regime, as well as market volatility across asset classes, wealth management has become highly sophisticated and requires the skills of specialist professionals. Furthermore, for your wealth to be managed effectively, a deep understanding of your personal circumstances and objectives are needed. Only from such a position can a strategy that accounts for tax efficiency, risk mitigation and flexibility be developed which can meet your specific requirements and aspirations.

How we can help

We can develop with you a wealth management and preservation strategy that is bespoke to your circumstances and objectives. By choosing not to directly manage your investments, we are also able to use our own independent research capabilities and tax knowledge to introduce you to carefully selected investment management groups, as well as considering products and services from insurance companies, banks, building societies and the Government that suit your needs. This enables us to construct portfolios of all sizes, in the most appropriate structure, and to ensure ongoing suitability through regular reviews.

Key contact

For further information or if you would like to arrange a meeting please contact Derek Prentice on (0)1727 896033 or dprentice@ksfa.co.uk.

Financial advice is provided by Kingston Smith Financial Advisers Ltd, an appointed representative of Argentis Financial Management Ltd which is authorised and regulated by the Financial Services Authority (FSA).

The Financial Services Authority does not regulate some forms of buy to lets, commercial mortgages, tax advice, wills, trusts or certain offshore investments.

Lead Contact

Key People

- [Derek Prentice](#)
- [Andy Peters](#)

Links

- [Our Links Disclaimer](#)
- [Private Client Services](#)
- [Personal Tax Service](#)
- [Financial Planning](#)
- [Estates](#)
- [Private Office](#)
- [Dedicated Wealth Advisory Service](#)
- [Wealth Management](#)
- [Family Protection](#)
- [Retirement Planning](#)
- [Property Finance](#)

Follow us on:

