Bennett Wealth Planning

Financial Planning | Wealth Management | Stockbroking

Our Family Team = "Team Bennett"

We are independent financial planners and wealth managers providing optimised bespoke outcomes that enhance our clients' lifestyles.

Please contact us to make an appointment:

Office Telephone:	+44 (0)1822 855060
Email:	team@bennettwealthplanning.com
Registered Office Address:	Woburn House, The Rock Complex, Yelverton, Devon, PL20 6BS
Website:	www.bennettwealthplanning.com

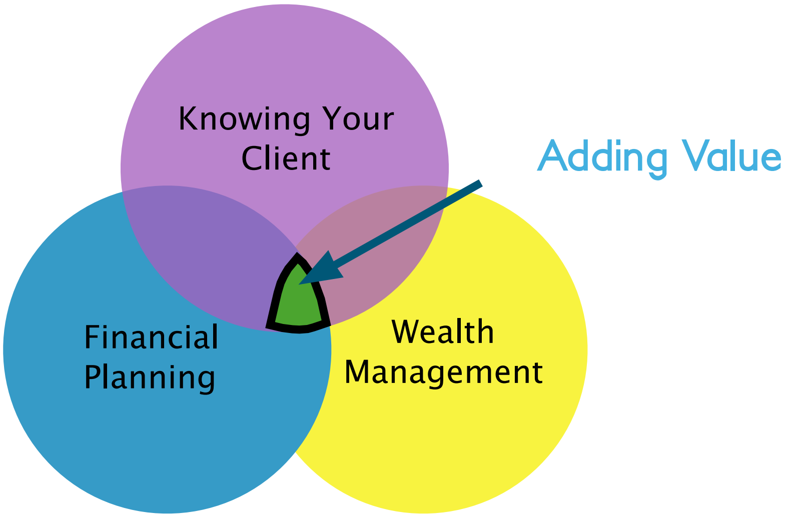
We offer you an initial meeting at our time and business expense without obligation. Our purpose is to make your money work harder for your benefit .

ABOUT YOU

(It is not about us!)

You are:

- serious and discerning long term investors
- seeking advice for pre- or post-retirement
- seeking advice to help make your money work harder
- looking for a trusted, friendly expert team which adds value
- seeking advice on Estate Planning



Results in Better Outcomes

Our USPs

- We are an intergenerational client facing family business - we care!
- All our personalised plans are bespoke, aligned to meet our client's objectives
- We are a consistent, cost-effective, advisory, independent, one-stop-shop
- We compound the Added Value we bring at each stage of our 6 Step Process
- It is in our DNA to keep costs low: no VAT; no platform charge.

ENHANCING LIFESTYLE

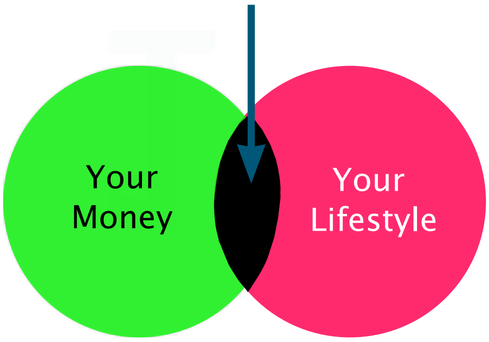
**6 Step Process:
Adding Value for your dreams to become a Reality**

1

Initial Exploratory Meeting

- Free to You - no obligation
- We listen - understand your goals
- Your current situation/expectations
- What we do, "add value"
- Our philosophy/plan/process
- Explain Costs

Financial Planning



2

Formal Meeting

- Full Review - detailed assets
- Define GOALS - priorities
- Engage - asymmetric knowledge
- Create a PLAN to take control
- Determine a good outcome
- Understand Costs

We help define objectives

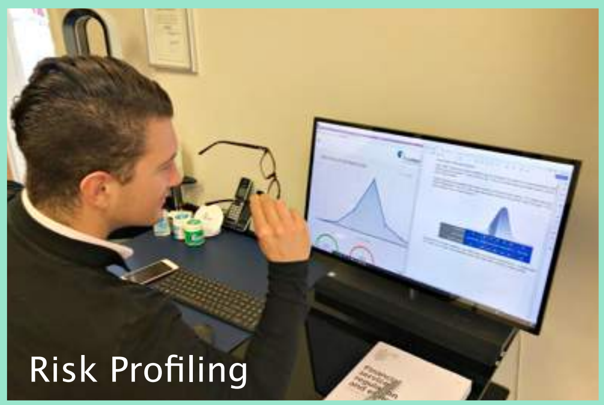
We create an Optimised Plan

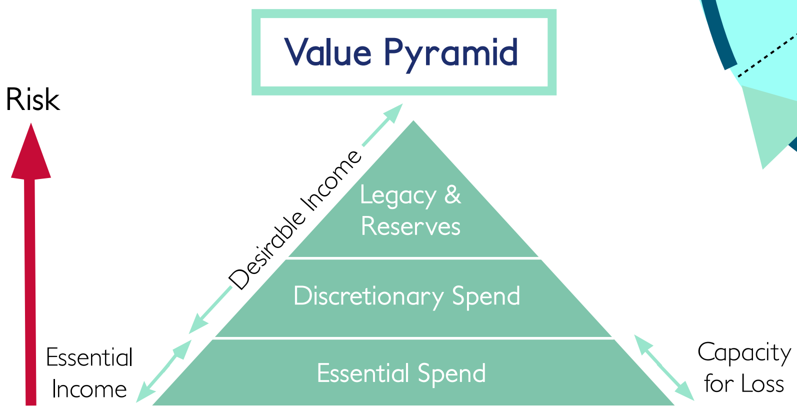
Our Expertise = Your Knowledge

3

Analyse/Evaluate

- Align resources with goals/lifestyle
- Understand your priorities
- Review tax status/diversification
- Context of your attitude to risk
- Help your level of knowledge





4

Develop the Plan

- Confirm your resources available
- Review liquidity/flexibility/risk
- Report recommendations/suitability
- Confirm "added value"/outcomes
- Clarify Costs

Post-Retirement Aims

- 5% pa income paid monthly
- Sustain long term capital
- Aim to grow capital
- Ongoing Annual Review

Pre-Retirement Positioning

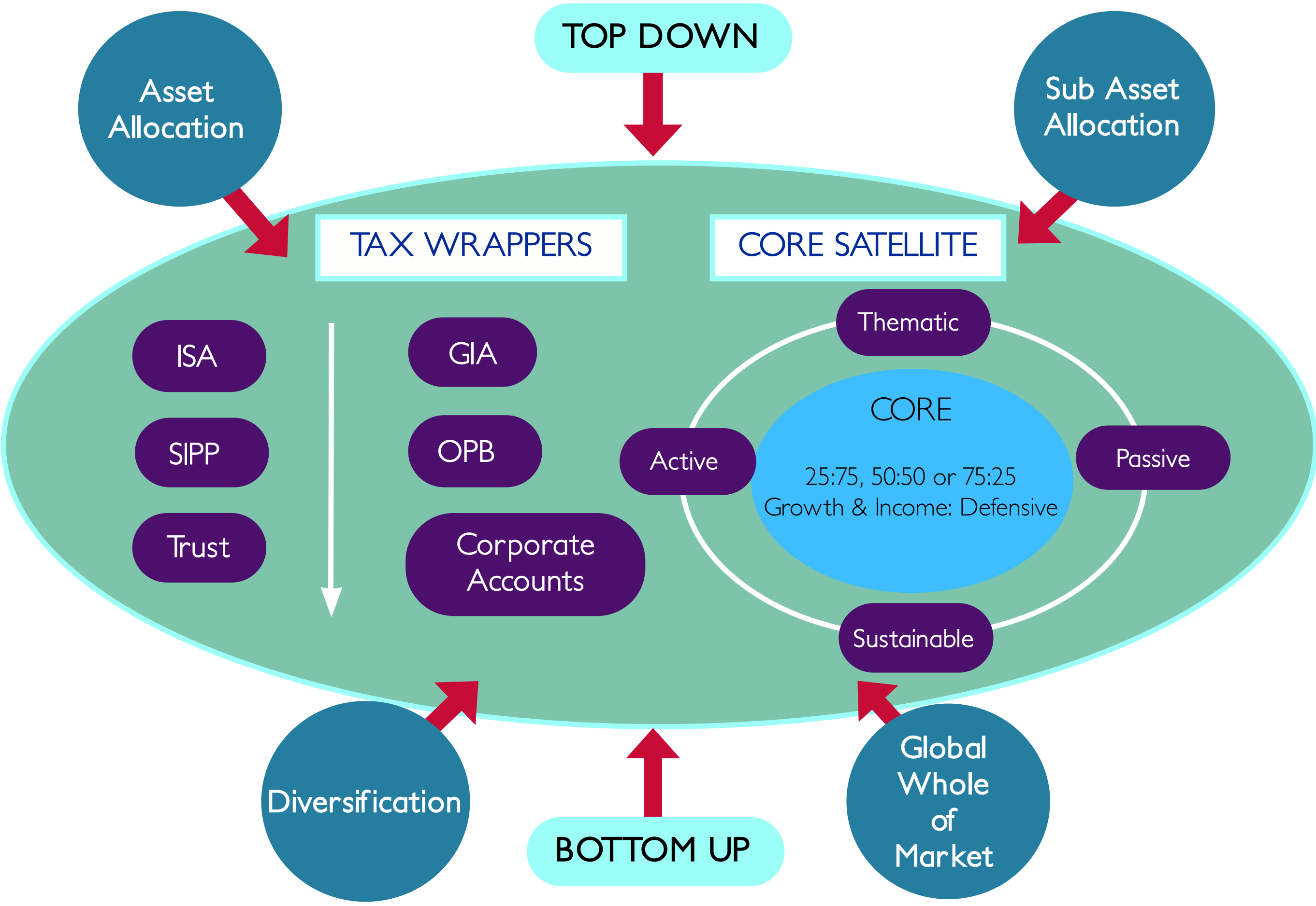
- Positioning to add value
- Total return/tax-efficient
- Diversified themes
- Time horizon/Risk

5

Implement Agreed Plan

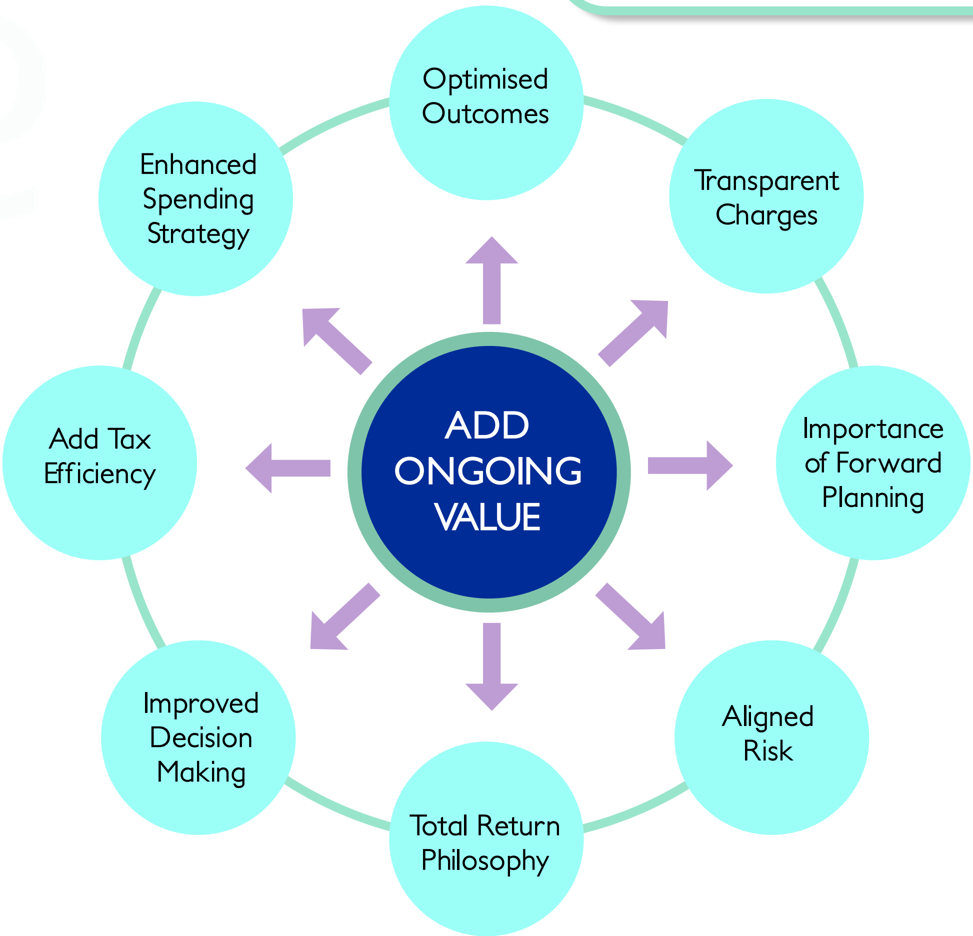
- Implementation/Confirmation
- Financial Planning wrappers (tax)
- Portfolio Construction/Design
- Written Plan/Reporting
- Communication plan

Plan & Portfolio Construction



Monitor & Ongoing Review

- Annual Review - expectations
- Review/Update Goals/Costs
- Investment performance
- Review Risk/Confirm value
- Change: Life/legal/tax/regulatory
- Feedback



Our Financial Planning & Investment Philosophy

We:

- Take a holistic approach integrating financial planning with our bespoke, independent, in-house, boutique wealth management
- Place our clients at the centre of our business
- Keep costs low, unbundled and transparent
- Listen and help align your goals to enhance your lifestyle
- Balance top-down asset allocation with bottom-up fund / stockpicking
- Buy and hold for the long term

Our:

- Investment approach is global, total-return, style blended and diversified

ABOUT US

Team Bennett

Our purpose is to provide independent, cost-effective, personalised, bespoke client friendly advice from the whole of the market to optimise outcomes.

CLIENT FACING

Barry W P Bennett MA(Cantab) Chartered FCSI FPFS IMC

Chartered Financial Planner, Chartered Wealth Manager, Stockbroker

Simon Peter Bennett
MEng (Hons) Chartered MCSI DipPFS

Chartered Wealth Manager, Stockbroker, Financial Planner

Henry Jamie Bennett BSc

Trainee Financial Planner, Stockbroker and Wealth Manager

YOU

SUPPORT

Natasha Bennett BSc (Hons)

Marketing Manager

Karen Bennett

Administrator & HR Manager