

Individually designed
financial advice



 **Jackson Jeffrey**
INDEPENDENT FINANCIAL SERVICES

Introduction

Jackson Jeffrey Financial Services

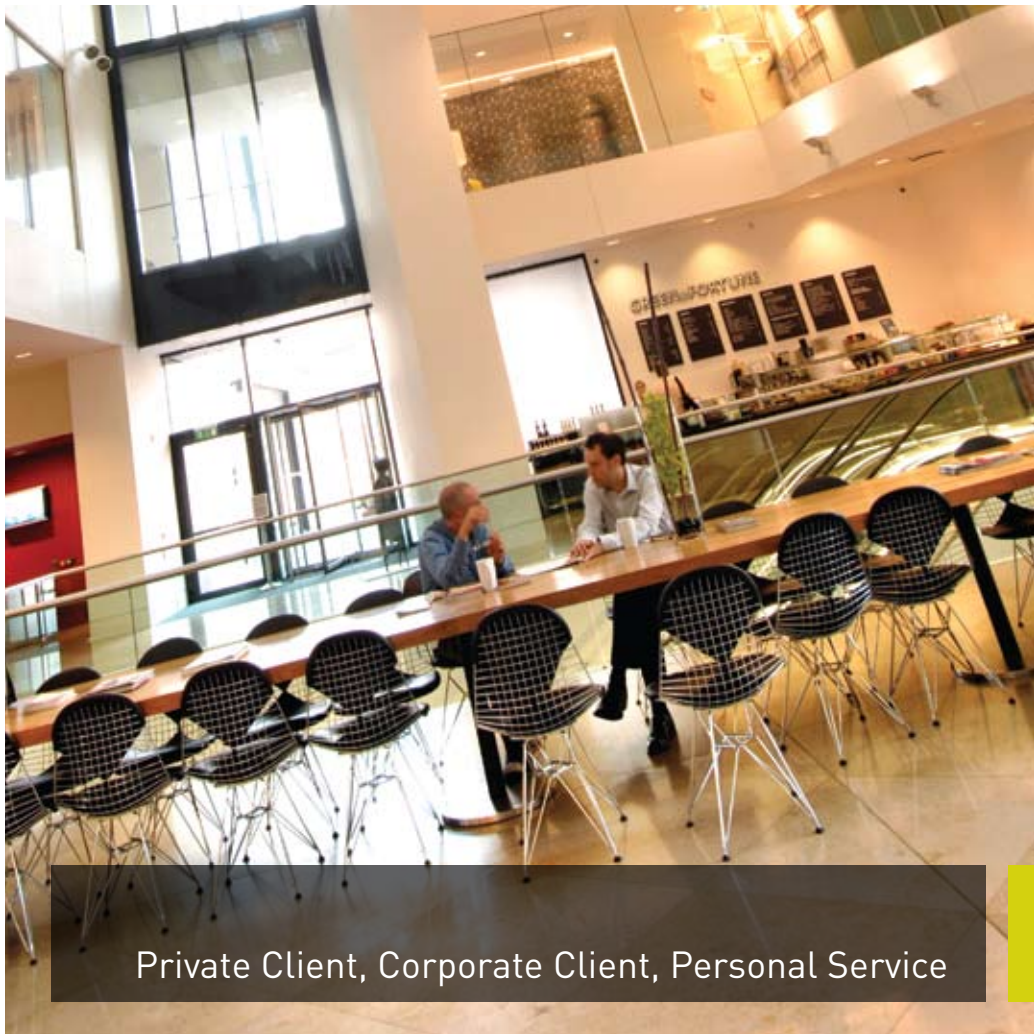
We have many years experience providing corporate and personal financial planning and also employee benefit advice.

When it comes to providing advice to corporate clients we work to identify the key objectives of the business and the requirements of the partners, directors and owners.

Our approach is to build a long lasting relationship with private clients over time, so that we really understand their financial aspirations.

We recognise that all financial needs require a degree of individual design and a personal service to ensure the right outcome.

So, whether you personally require assistance with financial planning, or your business does, we can help to accomplish your needs.



Private Client, Corporate Client, Personal Service

Corporate Financial Planning

Throughout all stages of your business

1

From the moment your business is established there are often many financial planning matters for you to consider.

As your business expands it is likely the value will increase. It may be that your business relies on key personnel who significantly add to the increasing value due to their skills and knowledge.

In the same way that you may need to consider your own succession plan, you should also consider what would happen if another key member of your business moved on, or (potentially worse) died unexpectedly or became seriously ill.

Of equal importance, if your business is owned by several partners or shareholders, you should consider what the outcome would be in the event of the unexpected death or illness of one or more parties.

Do you feel comfortable that these risks have been considered and accordingly addressed in your business?

We have the knowledge and experience to provide the appropriate financial planning and support throughout all stages of your business. So, even if you already have arrangements in place, we can help ensure that they remain up to date and suitable.



Establishment, Expansion, Succession



Recruitment, Retention, Reward

Employee Benefit Planning

Designing the right reward package

2

If you have employees, recruitment is a fundamental part of your business.

Employing the right people can make all the difference to your continuing success.

The costs that can be associated with recruiting the right employee can run into the thousands, and this doesn't include the time that you spend carrying out interviews and induction programmes.

Once you have secured the right employee for the job, retention will become a critical goal. You want them to remain an employee for as long as practically possible – to help reduce 'replacement recruitment' costs.

A well designed reward package is instrumental in motivating and encouraging employees. Sometimes this just needs to be communicated more powerfully to ensure the true value is appreciated!

A reward package shouldn't just consist of a salary; there are many other benefits to consider such as pensions, private medical insurance and life and disability cover. These can be included in an employee reward package relatively inexpensively.

We can discuss and advise you as to the various options and then implement and communicate these additional benefits to ensure maximum value is recognised by your employees.

Private Client Financial Planning

Helping to achieve your goals

3

What are your goals, and when do you want to achieve them? We recognise that for most individuals this involves living happy, healthy and prosperous lives. Our purpose is to discuss your financial goals and devise a plan to assist in making desires become reality so that you can really enjoy life!

Throughout your working life you may face the predicament of 'living for today' but also 'accumulating wealth for tomorrow'. We consider your circumstances and create a plan to ensure that the right balance is achieved. Along the way, you may require assistance with preserving your wealth and maintaining your plan. To us, the ongoing review of your plan is vitally important as it ensures everything remains on track and brings you peace of mind.

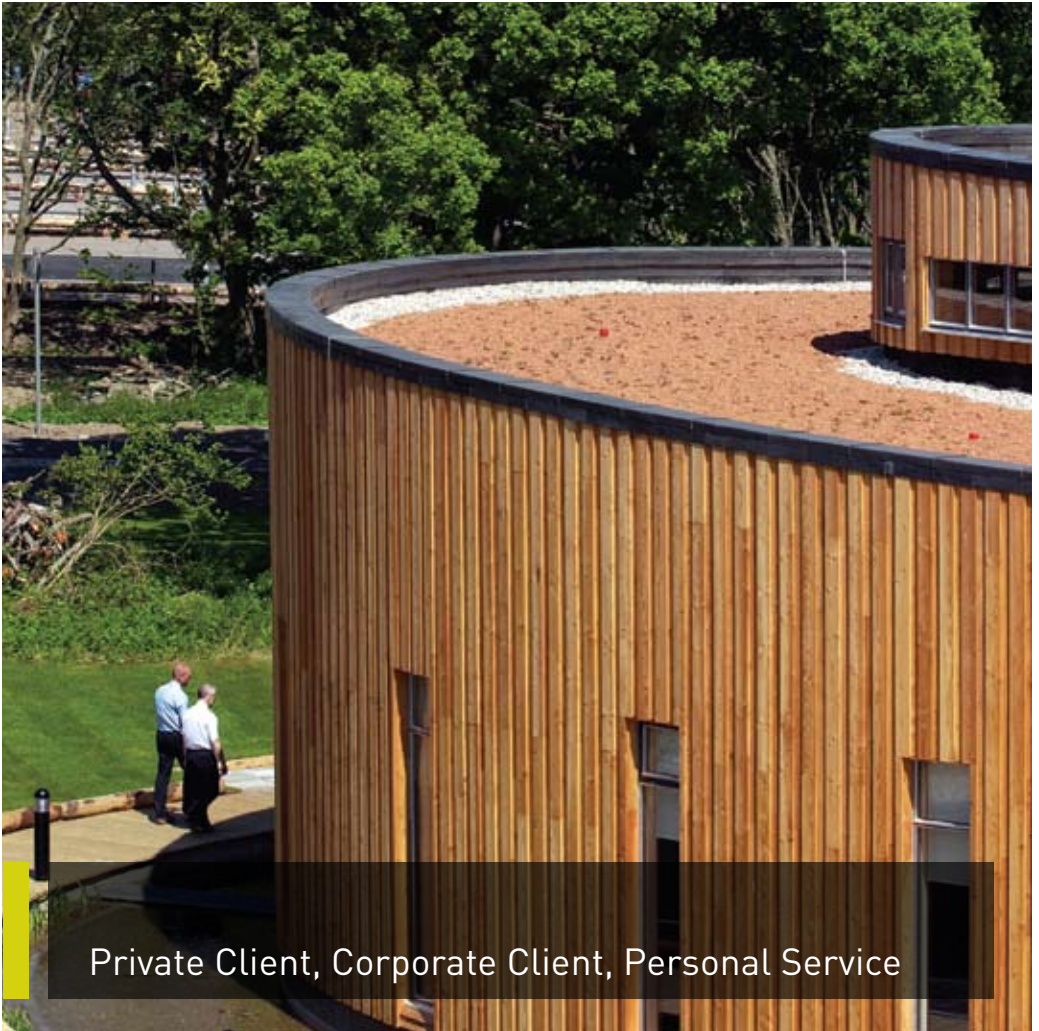
Once your working life comes to a close, you want to continue to do the things you have planned for and enjoy during your retirement.

To achieve your financial goals you may need to commence new or review existing investments, pensions and protection policies. As independent financial planners, we conduct research and arrange appropriate policies based on your needs – not ours!

We have the understanding and qualifications to advise and assist you with achieving your financial goals. So, whether you are at the beginning of your working life through to your retirement years we can help.



Accumulation, Preservation, Enjoyment



Private Client, Corporate Client, Personal Service

Testimonials

Don't take our word for it!

I was first introduced to Simon Jackson whilst working in my first architectural practice in 1988. Then as now he provided sound and comprehensive advice which has led me to retain him as my financial advisor for over 20 years. I believe a very high level of trust exists between us – for me, a fundamental requirement when dealing with financial matters.

Simon continues to provide personal advice and works with my architectural practice regarding pensions and life insurances. I have no hesitation in recommending Simon as a truly professional and knowledgeable Financial Adviser... and a very likeable individual who is always a pleasure to work with.

Nic Sampson, Creative Director
ESA Architecture Ltd

Helen Jeffrey became our personal adviser for the company I was Operations Director for and as the company grew I worked closely with her, discovering I could leave her to contact, advise and communicate with our twelve site Managers across the UK, leaving me free to do my job.

I had a constant need to acquire pension and insurance information in short time frames and again I learned I could depend on Helen. She demonstrates a broad understanding of pensions, insurances and savings schemes and always gives impartial advice. I have no hesitation in recommending Helen knowing she will give the same impartial advice to others as she has to me.

Phil Ottaway
Retired Operations Director



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