

## Your Solutions

At Jackson Jeffrey we believe in a structured financial planning process and encourage the development of strong relationships to ensure that **the service you experience is high quality and long lasting.**

We take the time to find the solutions that are right for you once we have listened to you and learned about your particular needs and circumstances.

Here are some of the solutions that we can arrange for you:

### Private Client Financial Planning

- New Personal Pension Plans (including Self Invested Pensions)
- Consolidation of existing Pensions (Transfers)
- Retirement Options (e.g. Income Drawdown, Phased Drawdown and annuities)
- ISAs
- UK based saving and investment options
- Offshore saving and investment options
- Life Assurance
- Critical Illness Cover
- Income Protection Cover
- Inheritance Tax Advice
- Private Medical Insurance

### Corporate Client Financial Planning

- Shareholder Protection
- Partnership Protection
- Key Person Life Assurance
- Key Person Income Protection
- Executive Income Protection
- Executive Pension Planning including Small Self Administered Schemes (SSAS) and Self invested Personal Pensions (SIPP)
- Employee Pension Schemes
- Private Medical Insurance
- Group Life Assurance Schemes
- Group Critical Illness Schemes
- Group Income Protection Schemes

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