INVESTOR PROFILE

vouchedfor
TOP RATED FIRM 2020

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Relax.

We'll help you:

- Make sense of your money
- Simplify your plans
- Invest for your future

Our Certified and Chartered Financial Planner provides low cost, easy and friendly financial planning advice to help you make positive decisions.

CFP TM

Financial Planner Chartered

Who we work with

Are you accumulating wealth?

If you want to:

- Work out how to invest your surplus cash
- Plan for a comfortable retirement
- Pay off your mortgage
- Balance these with enjoying your life now

Then you're in the right place. We work with lots of clients that want to make sure they have a good life now and in the future.

Are you planning for retirement?

If you want to:

- Seriously plan for retirement
- Work out how much income you'll have when you retire
- Plot a way to quit work sooner rather than later

Let's talk! We help lots of clients actively plan and then stay on track to achieve the retirement they really want.

Are you retired or about to retire?

If you want to:

- Simplify your investments and pensions
- Make sure they are invested in the right place
- Generate an income to help you fund your retirement

Then now's the time to take action. Many of our clients are already in retirement and rely on us to manage their income and investments so they can enjoy their lives.

How we work

It's simple.

We: listen; advise; plan; implement.

You: Relax.

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What’s the value of financial advice?

There’s lots of evidence to show how professional advice will benefit you financially.

According to the International Longevity Centre’s (ILC) report ‘What it’s worth – Revisiting the value of financial advice’:

- People who received professional financial advice between 2001 and 2006 boosted their wealth by **£47,706** in 2014/16.
- The benefit of financial advice for accumulating pension wealth is **£30,991**.
- Those who took financial advice on occupational pension income increased their income by **£1155**.
- An ongoing relationship with a financial adviser leads to better financial outcomes. Those who reported receiving advice at both time points in the analysis had **nearly 50% higher average pension wealth** than those only advised at the start.

Source: ILC

Further research by unbiased.co.uk shows:

- The benefits of financial advice can outweigh the cost by **5,813%**
- **34%** of people who make financial decisions without an adviser later regret them
- By taking advice near the start of your career, you can increase the amount of money you save into your pension by **£34,300** (compared to those who don’t take advice)

Source: Unbiased

Finally, Vanguard’s research **‘Assessing the value of advice’** looked at 44,000 self-directed investors who switched to an adviser between 2014-18. They found that 8 in 10 investors now have an **80% or greater probability of achieving a secure retirement.**

Source: Vanguard

“We’re very happy with the performance of our investments and with the professional and friendly attitude of all the Investor Profile staff we have encountered.”

Maurice Roebuck

“I have been a client of Jaskarn since 2013 and since then my investments have performed so well that I am well on my way to achieving my retirement plans.”

Steve Blaber

The value of financial advice - according to our clients

'Value' isn't just about pounds, pence and percentages. It's also about how we make you feel. We asked our clients about the value they receive from Investor Profile and here's what they told us:

We asked: Which factor do you consider to be most important in your relationship with us?

They replied: Providing a 'safe pair of hands'. This is key for so many people – trusting that we will manage and help them stick to their financial plans, so they can achieve their goals.

We asked: How do you measure the value you receive?

They replied: Knowing I have a 'go-to' person for my financial affairs. Our clients understand the value of having a trusted adviser on-hand to guide and answer their questions.

We asked: What is the biggest single benefit you get from working with us?

They replied: Peace of mind, trust, someone to answer my questions, safety and security. We're delighted that our clients feel safe in the knowledge that their finances are in good hands.

We were also delighted when our clients told us that:

95.00% would recommend us to family, friends and colleagues

94.94% believe working with us will help them to achieve their financial goals

98.73% are satisfied with the speed of response from the support team

98.77% are satisfied that we understand their needs, goals and objectives

98.77% are satisfied with the speed of response from their adviser

Source: Investor Profile client survey, July 2019:

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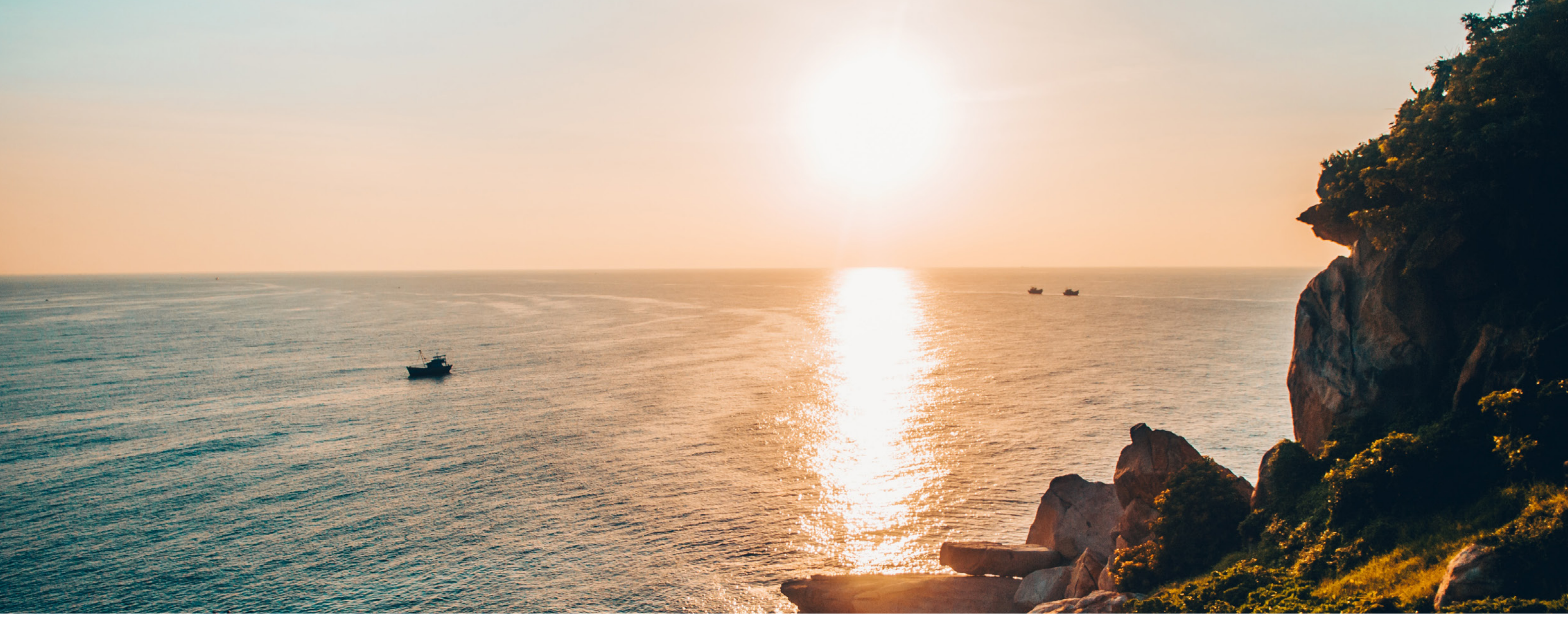


Why choose Investor Profile?

There are many benefits to receiving financial advice, but even more benefits if you choose to work with us. Here are just a few...

1

Independent advice

We provide straightforward, independent, one-to-one financial advice which puts you in control of your financial future. We want to make you feel comfortable, confident and happy about your finances.

4

Making it simple

We are passionate about making financial planning accessible for everyone. We take care of all paperwork in a simple and friendly way, making the whole process as easy as possible for you.

2

Low-cost

We provide low-cost financial advice, delivered to a high standard by a Chartered and Certified Financial Planner. We are very cost effective, with clients often reducing their financial advice fees by half.

5

Focused on you

We are focused on you. Our service is delivered remotely, but is still completely personal and bespoke to you. We focus on your personal goals and ensure that your financial plans will help you to achieve them.

3

Regular reviews

We work remotely via telephone and e-mail to keep your costs low. We provide regular financial reviews and reporting by telephone and e-mail, making it faster and more convenient for you.

6

Easy to access

We provide easy access to information: Our clients can see all of their investments in one place and can update their personal information with our easy to use client portal.

What we do

We'll call you to discuss your thoughts.

We'll gather the data we need to advise you properly.

We'll produce a report to clarify the things you need to do now.

We'll make specific planning and product recommendation.

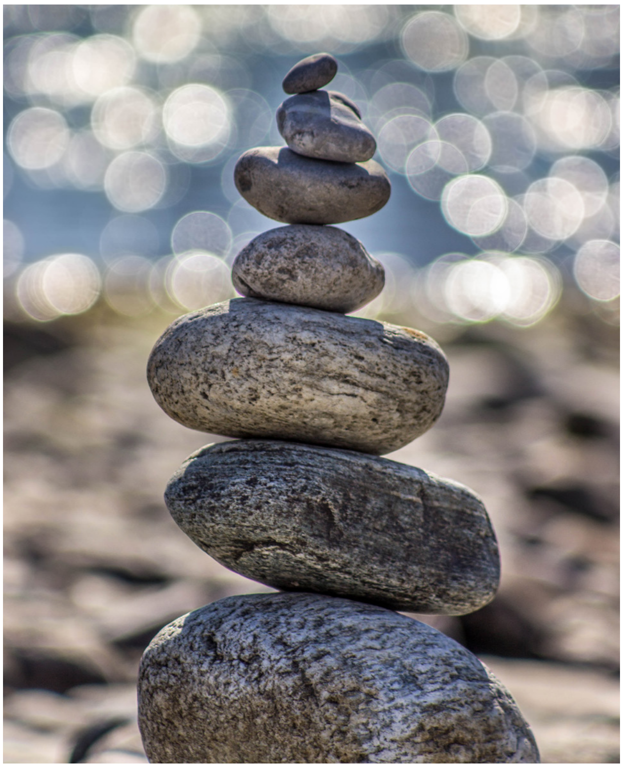
You'll have a chance to read and digest the advice.

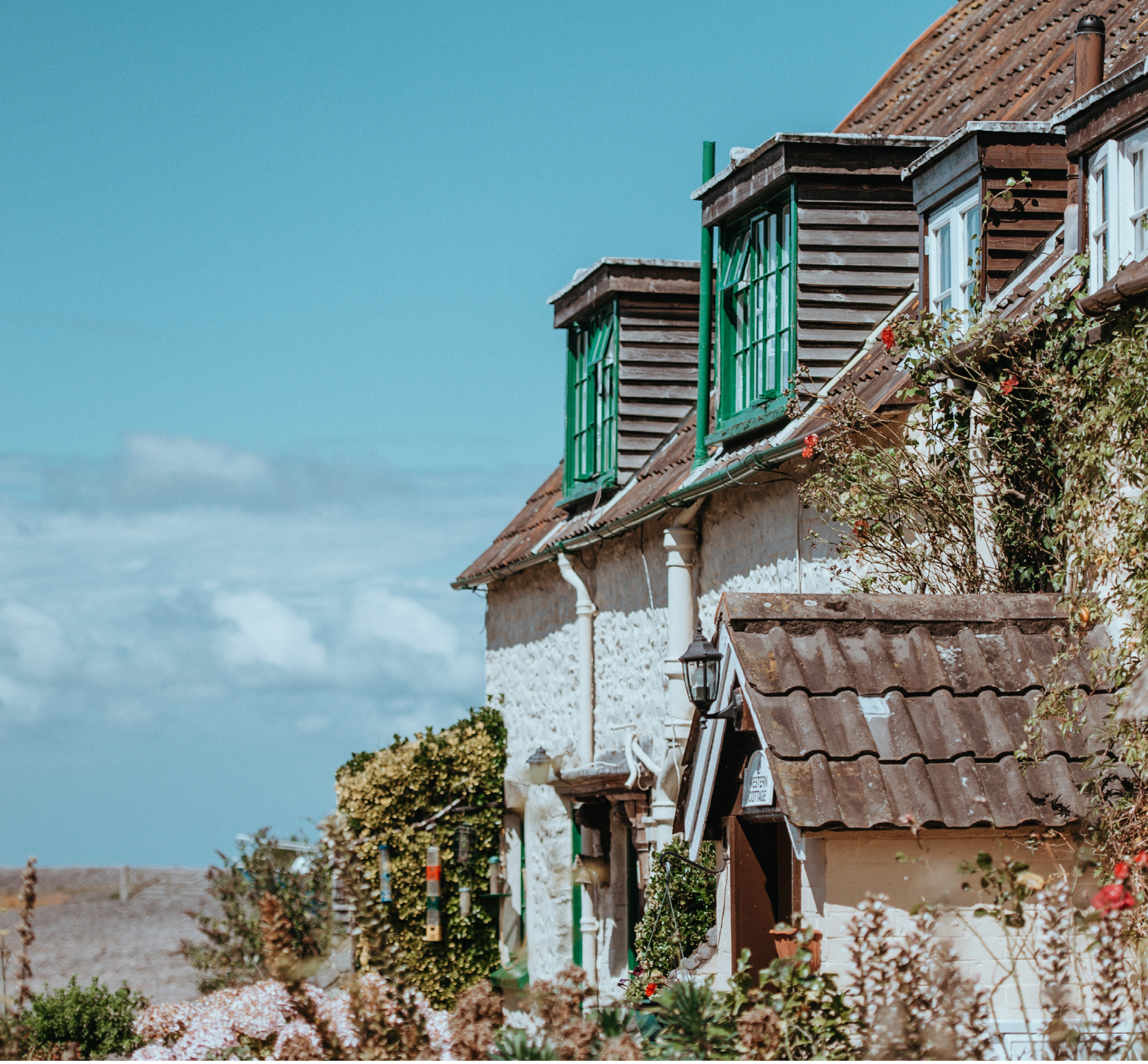
We'll then implement everything for you.

We'll continue to work with you with review calls and reporting 4 times a year.

You can contact us any time if you have a query.

We'll work throughout the year to ensure your plans remain on track.





So what's on your mind?

Feel free to ask us a question. We love what we do and will help you as much as we can to achieve your financial goals.

Contact us today

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