



Wealth

**PERITUS**  
WEALTH

**We think that looking after your financial wellbeing is as important as looking after your health.**

**We offer expert advice to help you make the most of your pensions and investments, helping you achieve your financial goals.**

**We'll also help you to protect the things that are important to you so you can relax knowing you have it all covered.**



# Wealth Management



---

Wealth management is about protecting, preserving and increasing your assets – and we can help.

We will tailor an investment strategy to your individual needs to help protect your wealth.

## **What we do:**

- Review your current policies to make sure they remain suitable for you;
- Work with you to help you achieve your goals and objectives, whatever they may be;
- Ensure you use your tax allowances each year;
- Ensure that your wealth can be passed on to loved ones by minimising or mitigating any Inheritance Tax liability;
- The FCA does not regulate taxation advice.

## **What we don't do:**

- Look into a crystal ball – please note, we advise you using information based on our current understanding of tax legislation and regulations, which can be subject to change

# Retirement



Planning your finances for retirement is vital, and our specialists at Peritus Wealth can help.

We can prepare a bespoke financial plan to incorporate and streamline existing pensions or advise on setting up a new pension scheme so that you have the confidence knowing you can retire at your chosen age with the income you require.

## **What we do:**

- Provide a complete pension planning service;
- Develop a bespoke strategy to yield the best return based on your circumstances;
- Offer clear, sound and sensible advice to help take the financial stress out of retirement;
- Please remember the value of your investment can go down as well as up and you may not get back the full amount invested.

# Protection



At Peritus Wealth, we can't prevent unforeseen circumstances from happening, but we can help protect your family and your finances should the unexpected occur.

Our specialist insurance advisers offer a wide range of insurance services and can provide you with the most suitable solutions available.

## **What we do:**

- Make sure you and your family are properly protected should the worst happen;
- Take the stress out of finding the right cover;
- Work with leading specialist insurance providers to find the most suitable package
- We can also provide specialist advice to protect the continuity of your business incorporating Keyperson Cover, Shareholder Protection.

## Meet your Adviser

Specialist Wealth Adviser, Katherine Stallwood, has over 15 years of experience in finance. She helps individuals make plans for the future. Getting the best out of their investments. Ensuring they have protection in place for the people they love.

Katherine is passionate about providing the right advice to her clients. Making sure her clients have protection should anything happen or their circumstances change. Helping clients to understand the policies they have so they can retire at their planned age.

After discussing a clients future, Katherine will put a plan into place to achieve goals. This could include:

- using cashflow modelling;
- looking at how income could be structured to fill the gap until state pension age;
- paying more into a pension;
- reviewing the retirement date;
- managing expectations on the lifestyle the pensions will provide.

Katherine is available to discuss your future retirement, investment and protection requirements.



*Specialist Wealth Adviser  
Katherine Stallwood*



For more information call **0773 9730 625**  
**[katherine@peritus-wealth.co.uk](mailto:katherine@peritus-wealth.co.uk)**

The value of an investment and income from it can go down as well as up. Your capital is at risk.



**Call 020 3745 5893**  
**[peritus-group.co.uk](http://peritus-group.co.uk)**

[info@peritus-group.co.uk](mailto:info@peritus-group.co.uk)

Registered Address: Peritus Private Finance Ltd, 1 Bankside, The Watermark, Tyne & Wear NE11 9SY

Registered in: England and Wales Reg No. 03490834

Peritus Wealth is a trading style of Peritus Private Finance Ltd which is authorised and regulated by the Financial Conduct Authority.