



SMARTER FINANCIAL PLANNING



We have more financial security than we've ever had before.



Ian and Anne's Story

Wealth management

I first met Jon in 2005 when he gave an address on the teachers' pension scheme at Clifton College. Following that, my wife and I booked a 1-1 session with him and we got on really well.

We had significant investments and a buy-to-let portfolio, as well as various different pension pots. Initially we discussed the pensions, but to see the bigger picture it made sense to transfer our whole portfolio to Jon.

I was 54 at the time, and with retirement in mind, it was particularly helpful to have Jon's expertise regarding my teachers' pension. Thanks to Jon's help and advice, I was able to agree an enhanced salary package which enabled me to retire from full-time teaching earlier than required, on a good pension.

From that point I started at Bristol Grammar School as a part-time sports coach. I re-joined the teachers' pension scheme there and have built up almost another 10 years of contributions (pro rata).



A fresh perspective

Jon has helped my wife Anne and me to think about our financial affairs and retirement options from many different angles.

What we like about Jon's approach is that he listens first, talks things through to find out what we really want, and designs solutions to suit us.

He's very interested in us as people and what our aims and aspirations are, and puts forward ideas and plans around those.

Throughout our married lives we have been fortunate to have the services of some good financial advisers. However, none has offered the excellent, comprehensive service that Jon does. It's a complete package and, in our view, money well spent.

A specialist approach

Teaching is a specialist area with different financial rules and regulations and so it was brilliant to find someone who really understood where we were coming from, particularly given that we were involved in the private sector.

Jon has given us a stable financial base by creating a well-balanced portfolio in property, cash, and stock and shares, which has given us more financial security than we've ever had before. Therefore, once we're fully retired, we are looking forward to doing some travelling, and hopefully visiting family in Australia.

Confidence and simplicity

Over the years, we have come to regard Jon very much as a friend as well as an adviser. He is very well qualified, but it is this relationship of trust and confidence in him as a person that we regard as vital.

Jon has the gift of keeping things clear and straightforward and we have every confidence in the advice he gives.