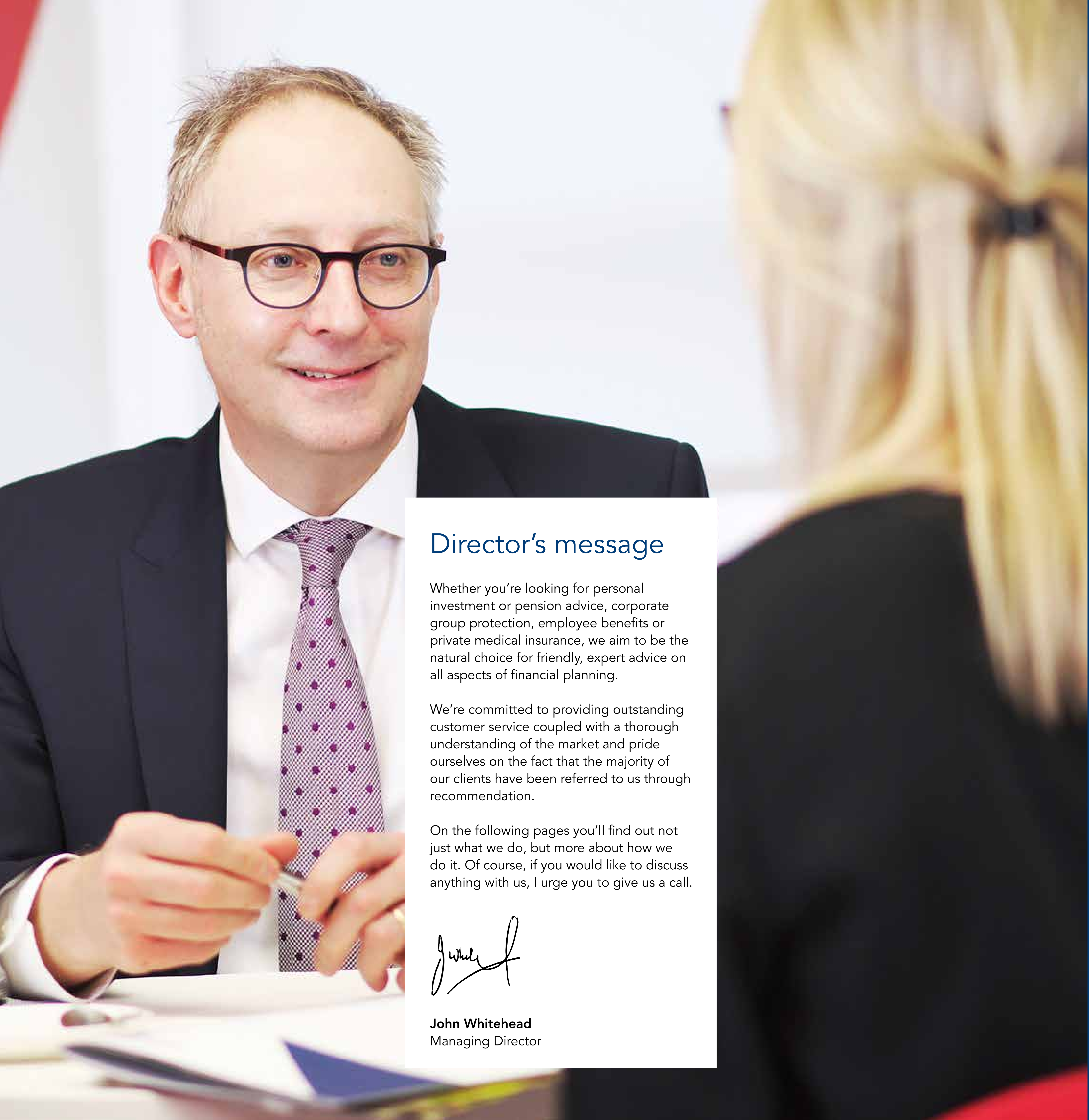
# Alan Boswell Financial Planners

## Our Services

ALAN BOSWELL
Financial Planners



## Director's message

Whether you're looking for personal investment or pension advice, corporate group protection, employee benefits or private medical insurance, we aim to be the natural choice for friendly, expert advice on all aspects of financial planning.

We're committed to providing outstanding customer service coupled with a thorough understanding of the market and pride ourselves on the fact that the majority of our clients have been referred to us through recommendation.

On the following pages you'll find out not just what we do, but more about how we do it. Of course, if you would like to discuss anything with us, I urge you to give us a call.

**John Whitehead**
Managing Director

## Welcome

Alan Boswell Financial Planners is a financial services company that provides clients with independent financial advice on investments, pensions, employee benefits and other key financial areas. It is part of the Alan Boswell Group of companies.

The company's philosophy is to build and maintain long-term trusted relationships between our clients and our highly qualified, independent financial advisers (IFAs).

In addition, we work closely with other professional organisations, such as solicitors and accountants, across the UK to provide financial advice to their partners, staff and clients.

Established in 1982, Alan Boswell Group has grown to become one of the UK's leading regional insurance brokers and independent financial advisers, with more than 350 staff, based at ten offices throughout East Anglia, including Norwich and Cambridge.

INVESTORS IN PEOPLE


## The Alan Boswell Group difference

As an independent insurance and financial planning group with more than three decades of experience, our longevity and reputation are the result of doing things a little differently – of going the extra mile for you, for our people and for our communities.

Alongside insurance and financial advice, we provide a distinct range of additional services, including risk management and health and safety, so you can get everything you, or your business, needs in one place.

**35 years**

We have more than 35 years' experience in providing the highest-quality advice and support to our customers.

# Our services

Our focus is on supporting you, so that you achieve your personal and business goals. We realise every client is different and has their own ambitions and future in mind. As one of the largest regional independent financial planners in the country, we feel we are perfectly placed to do this.

By obtaining a full understanding of your current financial position, your objectives and identifying your needs, our advisers can provide you with a clear plan. This allows us to provide you with the best solutions to realise your objectives.

We offer a range of products and services for both individuals and businesses.

## Wealth

Alan Boswell Financial Planners can create an investment portfolio designed to meet your financial goals and provide regular reviews to ensure that this remains on track.

- **Investments** *(including tax-efficient investments)*
- **Savings**
- **Retirement planning**

## Corporate

Whether you're a big corporation or a small business, we can help you from end-to-end, tailoring solutions that meet your needs.

- **Group pensions**
- **Keyperson cover**
- **Group protection**
- **Shareholder protection**
- **Employee benefits**

## Protection

Whether it is for personal peace of mind or business continuity, we are able to offer a range of solutions and services to meet your protection needs.

- **Life insurance**
- **Long-term care**
- **Critical illness cover**
- **Private medical insurance**
- **Income protection insurance**

# Our five step approach to advice

We aim to provide you with the best advice, best service and best information on pensions, investments and protection.

Whether you are an individual or a business, our financial planners will take the time to get to know you and your aspirations. Where applicable they will work to understand your tolerance to risk and ensure the recommended solutions fit with this. The range of solutions is vast, which can be confusing and daunting. Our role is to understand which approach, style and budget best suits you and your objectives.

We'll achieve this by following our five step approach to advice:

## 1 Getting to know you

A meeting, with no commitment, to get to know you, introduce the company and our services.

## 2 Research

We will collate all the information we have about your situation and undertake technical research to form our recommendations.

## 3 Our recommendations

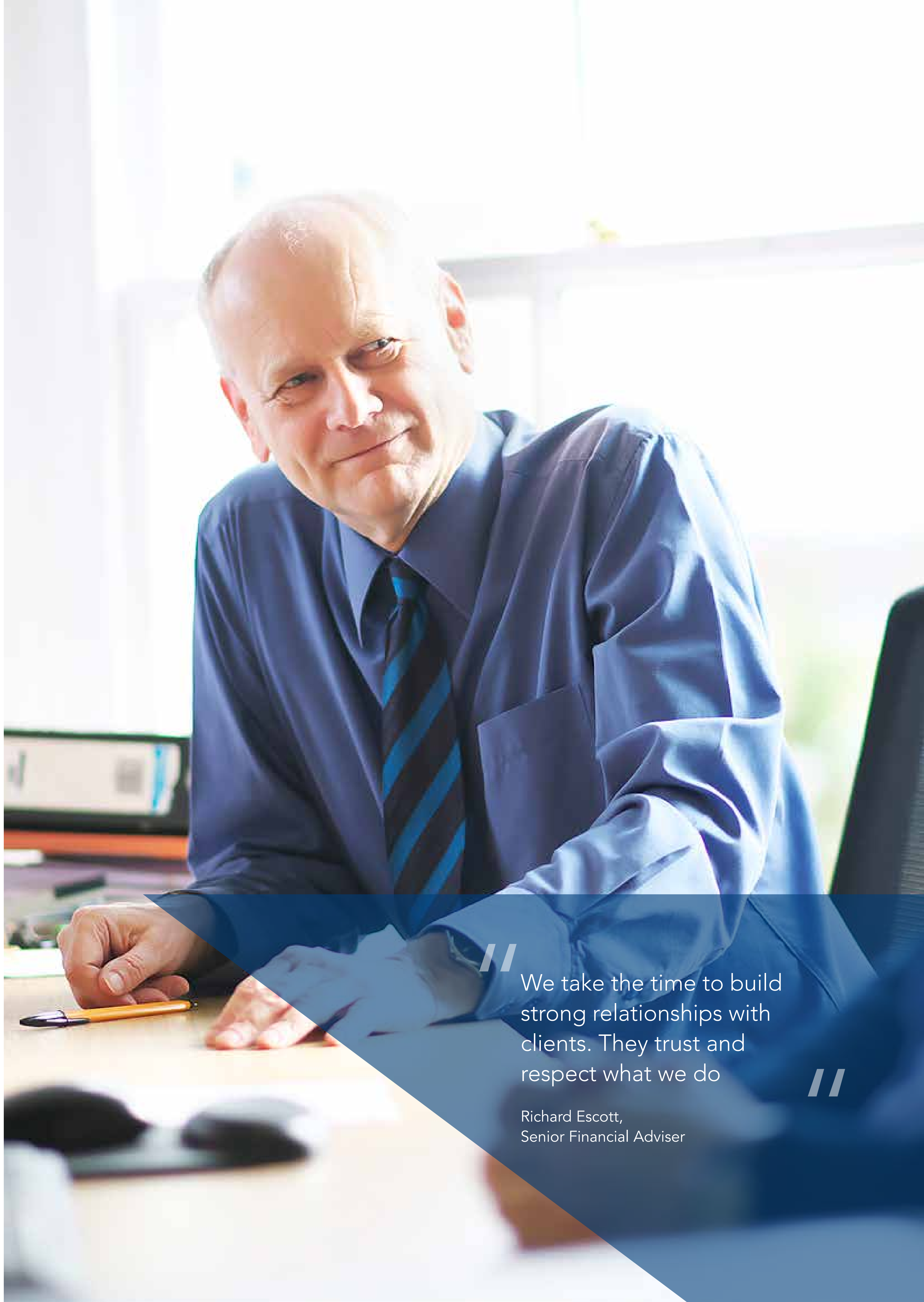
You will receive a comprehensive report, outlining your current position, our observations and our recommendations to help you achieve your goals.

## 4 Putting the plans in place

Once you are happy with our recommendations we will complete the necessary paperwork and issue the relevant documentation.

## 5 Keeping on track

If required, we can arrange a regular review of your personal or business objectives to ensure they are being achieved.



"Don't hesitate to give us a call whenever you have a question about insurance or financial services. We're happy to help however we can."

Alan Boswell,
Executive Chairman

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ALAN BOSWELL GROUP