

WORKING TOGETHER

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## YOUR RELATIONSHIP WITH LESTER BRUNT WEALTH MANAGEMENT



**LESTER • BRUNT**  
WEALTH MANAGEMENT

SPECIALISTS IN FINANCIAL PLANNING



@lesterbruntwealthmanagement



Building strong, long lasting relationships is the cornerstone of what we do; we work with you to understand your requirements and tailor our approach so it fits best with you and your needs.

Our plan, put simply, is to help you achieve your financial goals and aspirations, using all our knowledge and experience, whilst giving you the peace of mind knowing we are safeguarding your financial future.

We currently support and advise some 4560 clients and the map below shows how these clients are distributed.

For these clients we directly manage some £700 million of their wealth as well as provide advice in respect of family wealth outside of our direct management of some £300 million.



## LESTER BRUNT WEALTH MANAGEMENT



### OUR SERVICES

We have access to the St. James's Place distinctive approach to investment management. This helps us provide specialist advice to arrange all investments as tax efficiently as possible.

#### INVESTMENTS

Through St. James's Place we provide a distinctive approach to investment management and specialist advice to arrange all investments as tax efficiently as possible.

#### RETIREMENT PLANNING

Our pension options allow our clients to take advantage of all the retirement opportunities available and plan for a long and prosperous retirement.

#### INTERGENERATIONAL WEALTH

Our family-orientated financial approach enables families to work together to support each other across the generations.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

#### PROTECTION

We provide solutions to meet specialist insurance needs and mitigate the impact of tax for companies and the people who own and manage them.

#### CASH SAVINGS & BORROWING

Through St. James's Place relationships in the banking market, we offer access to a range of mortgage, cash deposit\*, specialist lending\* and other specialist banking services\*.

Your home may be repossessed if you do not keep up repayments on your mortgage.

#### OTHER SERVICES\*

We provide access to carefully selected high quality external providers, to complement and enhance our own range of services.

\* Please note that these services are separate and distinct to those offered by St. James's Place.

### OUR SERVICES

### WORKING TOGETHER

We have grown our business by establishing solid and long lasting bonds with individuals founded upon the high quality advice and guidance we provide. As these relationships develop, we are frequently introduced to the close friends and family of our original client.

This in turn means that we are often involved in discussions and planning that successfully ensures that the family wealth that has been created is successfully passed down the generations either during lifetime of the wealth creator or upon their demise.

In a similar way we have forged a number of very successful collaborations with organisations, societies and companies associated with our clients and this has allowed us to offer our services to a wider audience. Working to the same standards as applied with our private clients we work with these groups to provide tailored financial advice appropriate to our audience.





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We are at a unique stage in our history.

Never before have we had such an awareness of what we are doing to the planet, and never before have we had the power to do something about it.

Real success can only come if there is a change in our societies and in our economics and in our politics.

Sir David Attenborough



BUILDING A BETTER FUTURE

There is growing awareness of the potential damage we are inflicting on the environment because of our current way of life and how we tackle these challenges is a fiercely held debate. However, there is little disagreement that how you invest your money can have a significantly greater impact on the environment than us, as individuals, forgoing activities that are considered detrimental to the environment.

We sum this up in the phrase “Financial wellbeing in a world worth living in”.

St. James's Place demonstrate their commitment towards this goal by ensuring that all their fund managers are signed up to the principals detailed under the United Nations programme - The 2030 Agenda for Sustainable Development. Therefore, you can be assured that in securing the financial future for you and your family you are also making a positive step in protecting the future of everyone.

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Managing Partner Practice

**St. James's Place**

The Partner Practice is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the group's wealth management products and services, more details of which are set out on the groups' website at [www.sjp.co.uk/products](http://www.sjp.co.uk/products). The 'St. James's Place Partnership' and the title 'Partner Practice' are marketing terms used to describe St. James's Place representatives. Lester Brunt Wealth Management is a trading name of Lester Brunt Wealth Management Ltd.

**SJP APPROVED 23/06/2023**