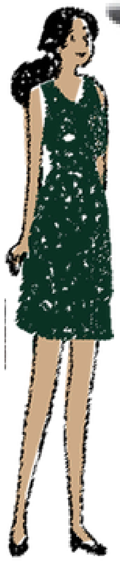
WORKING TOGETHER

Our relationship with you

Specialists in Financial Planning



LESTER·BRUNT
WEALTH MANAGEMENT

About LBWM & Working Together

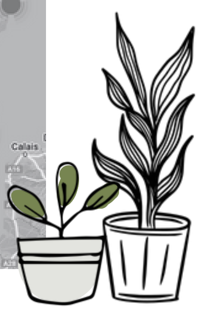
Building strong, long lasting relationships is the cornerstone of what we do; we work with you to understand your requirements and tailor our approach so it fits best with you and your needs.

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 over 4600 clients (as of June 2025) and the map below shows how these clients are distributed.

For these clients we directly manage some £850 million of their wealth as well as provide advice in respect of family wealth outside of our direct management.

Client distribution map



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.

Good Business Charter
Recognition for Responsible Business

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.

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.

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.

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

Scan for our website!

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