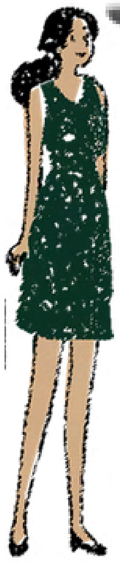
WORKING TOGETHER

Our relationship with you

Specialists in Financial Planning



LESTER BRUNT
WEALTH MANAGEMENT

About LBWM & Working Together

Building strong, long-lasting relationships is at the heart of everything we do. We take the time to understand your individual circumstances, tailoring our approach to meet your specific needs and objectives.

Our aim is simple: to help you achieve your financial goals and aspirations by drawing on our knowledge, experience and expertise, while giving you the peace of mind that your financial future is in safe hands.

As of July 2026, we support and advise more than 5,100 clients, and the map below illustrates where they are based.

We directly manage over £1 billion of our clients' wealth, while also providing strategic advice on wider family assets that sit outside our direct management.

Client distribution map

We have grown our business by building strong, long-lasting relationships based on the quality of our advice, the trust we earn, and the personal service we provide. As these relationships develop, clients often recommend us to their family members, friends and colleagues, allowing us to support multiple generations within the same family.

This means we are frequently involved in long-term financial planning that helps preserve and transfer family wealth efficiently. Whether through lifetime gifting strategies or estate planning, we work closely with families to help ensure their wealth is passed on in line with their wishes and future generations are well provided for.

We have also developed successful partnerships with organisations, professional associations and businesses connected to our clients. These collaborations enable us to extend our services to a broader audience while maintaining the same high standards of advice and service that our private clients expect. We work with each organisation to deliver tailored financial planning solutions that meet the needs of its members, employees or stakeholders.

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.

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

** SJP's cash deposit service powered by Flagstone.

Scan for our website!

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