



Welcome

Based in Knightsbridge, London SW1 we look after the financial affairs of individuals and families to help them achieve financial security and order, and live the lives they want (within their resources). We are a small team providing a 'financial GP' and 'hand-holding' service. It includes tax planning and investments. We are working with the grandchildren of many of our original clients alongside new clients from many walks of life.

We view money as an energy force and facilitator for the things people want to do with their lives. From funding education to achieving financial independence, building a business and philanthropic ventures, money is there to be used and not tucked to one side and treated in isolation.

We are impartial and independent and only charge fees. Our planning fees are based on time spent, not your wealth. When it comes to arranging investments and financial products we sit on the same side of the table as our clients and negotiate best terms.

Financial planning can sometimes come across as a rather dry subject so we commissioned cartoonist 'Loon' (Alasdair Hilleary) to lighten it a little, hopefully without detracting from important points such as including both spouses/partners in planning decisions - see Who Do We Suit?

Contact Us

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