Our Services
A commitment to you

We pride ourselves on being approachable, friendly, knowledgeable and truly independent

Heritage Financial Solutions Ltd
Investments | Pensions | Protection | Mortgages

Take Control of your finances and find out more with a free meeting

We are driven by a dedication to ensure your financial wellbeing, whatever your requirements and whatever your life stage.

Find out how working with one of our expert advisers can help you:

01352 770 845*

info@heritagefs.co.uk

www.heritagefs.co.uk

Our Services
A commitment to you

Working alongside your financial adviser, we will develop your unique goal based financial plan, you'll understand that financial planning is not just about ensuring a secure financial future; it's equally important for us to ensure that you continue to make the most of here and now.

Your adviser will identify, evaluate and recommend solutions that aim to help you achieve your personal goals for:

- Investments & savings
- Personal and business protection
- Retirement Planning
- Auto Enrolment & workplace pensions
- Mortgages
- Estate Planning
- Tax Planning
- Wills
- House Insurance

All designed to help you take control and manage your finances.

Our Investment Committee – An award winning team

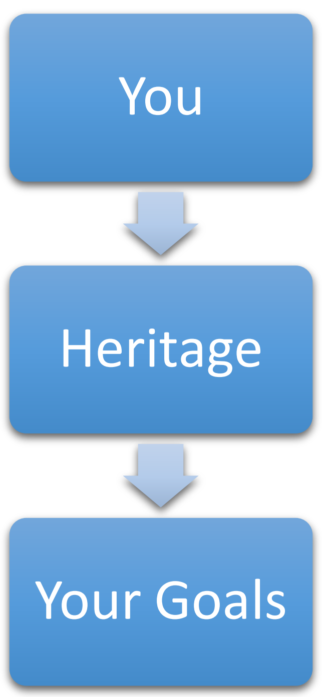
The investment committee meet every quarter to discuss a whole host of areas.

The investment committee is headed by Nick Middlehurst, who has over 30 years' experience in Financial Services. He is joined by Chris Bailey, a former London based fund manager who was awarded 'Top 40 under 40' by Citywire, along with two professional advisers who have a wealth of experience in financial services, stockbroking and investment management.

It's not just your adviser who is working for you

Lifetime events require specialist advice and your adviser has access to the relevant experts, including tax advisers, cash-flow planners, investment management companies and other product specialists, who can provide specific advice when required.

Beyond this, your adviser is also supported from the back office, we have highly trained and qualified support staff, who in the absence of your adviser can provide you with help and assistance.



Who are Heritage

Heritage Financial Solutions Ltd are Independent Financial Advisers. We work with a number of different types of clients to help create bespoke financial planning solutions.

From small to medium size businesses, self-employed tradesmen to high net worth individuals, we can cater for your personal circumstances.

We pride ourselves on being approachable, friendly, knowledgeable and truly independent.

One of our main strengths is our professional connections. Our ability to liaise with local estate agents, solicitors and accountants ensures your home purchase runs smoothly, your investment portfolio utilises the right tax structure and even your trust will have the desired outcome.

Our Principles

Service – We will always give our clients the service and support that we have led them to expect

Suitable – We will always offer our clients appropriate advice and products, targeted to meet their own unique needs.

Clear – We will always provide clear explanations of any supporting literature, no small print.

Contact – We will provide continued contact and support, making it easy for our clients to stay in touch.

Our services built around you

Access to an adviser either face-to-face, via telephone or email
Access to our services team and product specialists when required
Timely reviews where applicable to ensure your plans stay on track
Access to exclusive products and services
Regular valuations and annual tax statements
24/7 online access to your accounts
Informative newsletters and tailored communications
Seminars and specialist advice to inform and benefit you
Co-ordination with third parties such as solicitors and accountants