



Introducing Siobhan Record... Your financial planner

When I look back to when I first started out as a financial adviser, I realise that what I did then and what I do now are completely different jobs – in every sense, from my day-to-day work right through to the relationships I am privileged to have with my clients.

Back then, I was scavenging around, trying to make a living and to find the solutions that fitted. Now, I have the best job in the world, one where I really make a difference to the lives of my clients.

Despite these striking differences from my perspective, as far as most people are concerned, I was a financial adviser then and I am a financial adviser now.

Rightly or wrongly, the term 'financial adviser' can be associated with 'product flogging'. I like to distance myself from that.

I am a financial planner. "That's just a different way of saying you are a financial adviser," you say, but there is a distinction.

A financial adviser will find you the right product for your money and will (hopefully!) also consider your tax status, to make sure the

product is right for you.

However, my role as your financial planner delves much deeper: I help you to work out what you have and what this means for your future.

I also help you to understand what your goals are and together we work out the path to achieving them. Ultimately, it is about your life and how your money fits into it.

If you have investments of over £100,000 and are interested in finding out how I can help you with your financial planning, why not give Jo a call on 01562 745730 to arrange a no-obligation, free-of-charge, 30-minute meeting with me in the cre8 Wealth Management offices.

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Our clients have rated us as one of the top advisors in the country



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Want to know how much you need to be able to retire securely, maintaining a good standard of living?

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