Welcome to

Chrysalis Wealth Management

Chrysalis
Wealth Management

At Chrysalis Wealth Management Ltd we have one goal in mind – to give you financial advice that is suitable for your individual needs.

We do this through providing expert advice on a wide range of financial areas and then putting together a plan that's tailored to your individual needs and objectives, giving you peace of mind about your financial future.

Our areas of expertise

These are just some of the areas that we can help you with.

Inheritance tax planning

Our inheritance tax planning service is designed to keep your hard earned money in the family and avoid your loved ones having to pay a hefty tax on any inheritance you leave them. Through careful planning that's tailored to your individual needs, you can mitigate inheritance tax, or avoid it altogether, by arranging investments into trust, using life policies, changing your will, as well as through other different methods.

Building an effective investment portfolio

If you're looking to invest for the future then we can help put together a portfolio that meets your objectives and your attitude to risk. Whether you like to take risks with the aim to generate higher returns, or you need the comfort of guaranteed returns, we can recommend a tailored solution for your individual investment needs, making the most of any tax allowances that are available. This could include investment bonds, unit trusts or even the latest WRAP and asset management systems that put together and manage a range of different funds that all work together to meet your needs.

THE VALUE OF INVESTMENTS AND INCOME FROM THEM MAY GO DOWN. YOU MAY NOT GET BACK THE ORIGINAL AMOUNT INVESTED.

Retirement planning

Retirement should be a time to enjoy ourselves, so our retirement planning service aims to help you do just that. Whether your retirement is some way off in the future, or you are already there, we can review your existing arrangements, identify any gaps and recommend ways to ensure your pension plans really do add up to the type of retirement you want.

A PENSION IS A LONG TERM INVESTMENT. THE FUND VALUE MAY FLUCTUATE AND CAN GO DOWN. YOUR EVENTUAL INCOME MAY DEPEND UPON THE SIZE OF THE FUND AT RETIREMENT, FUTURE INTEREST RATES AND TAX LEGISLATION.

Protection

We know protection isn't an easy subject to think about. After all, life is for living, not for worrying about what's around the corner. Our job is to do the worrying for you and help make sure that you've got the right cover in place to give you peace of mind that you're financially protected against the things that life could throw at you. So, whether it's life cover, income protection, or critical illness, we can find and recommend the most appropriate policies for your needs.

Taxation planning

There are numerous ways that you can make the most of the tax allowances available and keep your money away from the tax man. With our expertise, we can review your situation and plans, and then put together an effective plan to help you make the most of the opportunities available.

INFORMATION IS BASED ON OUR CURRENT UNDERSTANDING OF TAXATION LEGISLATION AND REGULATIONS. ANY LEVELS AND BASIS OF AND RELIEFS FROM TAXATION ARE SUBJECT TO CHANGE.

Corporate financial planning

Businesses require specialist financial advice such as making sure you're protected in case you lose a key person, help getting a group pension scheme set up, or even group protection cover for your staff. We can provide the financial advice you need to make sure you have the right products for your business.

"We give you financial advice that is tailored to your individual needs."

Our approach

Our approach is to give you financial advice that is tailored to your individual needs, giving you peace of mind about your financial future. Therefore we start by doing a thorough fact find to make sure we understand your individual circumstances and needs, as well as your objectives and aspirations for the future. Then, and only then, do we put together a tailored plan and recommendation on the right course of action for your individual needs.

Here's how it works:

Stage 1 - Getting to know you

Building a clear picture of your circumstances, your needs and your plans for the future.

Stage 2 - Putting together a tailored plan

A detailed financial plan that's designed to meet your individual needs and plans.

Stage 3 - Recommendation

Recommending the products that meet your needs.

What this means to you

Whether the advice is for you, or your business, you can rest assured that you will receive financial advice that is tailored to your individual needs. This includes:

- Expert advice on your individual needs, as well as access to investment, protection and pension products that are deemed suitable for your needs
- Agreeing with your adviser the frequency of the meetings, as well as the type of information, reports, valuations, policy updates and market intelligence required
- Access to WRAP platforms and asset allocation tools which are designed to make sure you have products that perfectly match your attitude to risk
- A service contract given at the outset which includes details of the service you will receive and our cost structure

Contact us today

If you'd like to find out more about Chrysalis Wealth Management and the financial planning service we provide, please call us on

Tel: 03333 449 321

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