

F.A.O: Louise Hildred
MT Financial Management Ltd
Bank House
Broad Street
Spalding
PE11 1BR

What makes MT Financial Management Ltd different?

By becoming our client, we will help you to:

- Identify and achieve your financial goals
- Take control of your financial planning
- Manage your money effectively
- Reduce your tax liability
- Be clear about your options at all times.

By working with us, you have the reassurance of having:

- Expert advice on hand whenever you need it
- Regular, relevant financial reports
- A highly qualified, professional team working for you.



Financial Management Ltd
Chartered Financial Planners

Contact us at:

MT Financial Management Ltd, The Merchants House,
The White Hart, Market Place, Spalding,
Lincolnshire, PE11 1SU

Phone: 01775 717220 Fax: 01775 717225

Email: trevorwilshire@mooret.co.uk

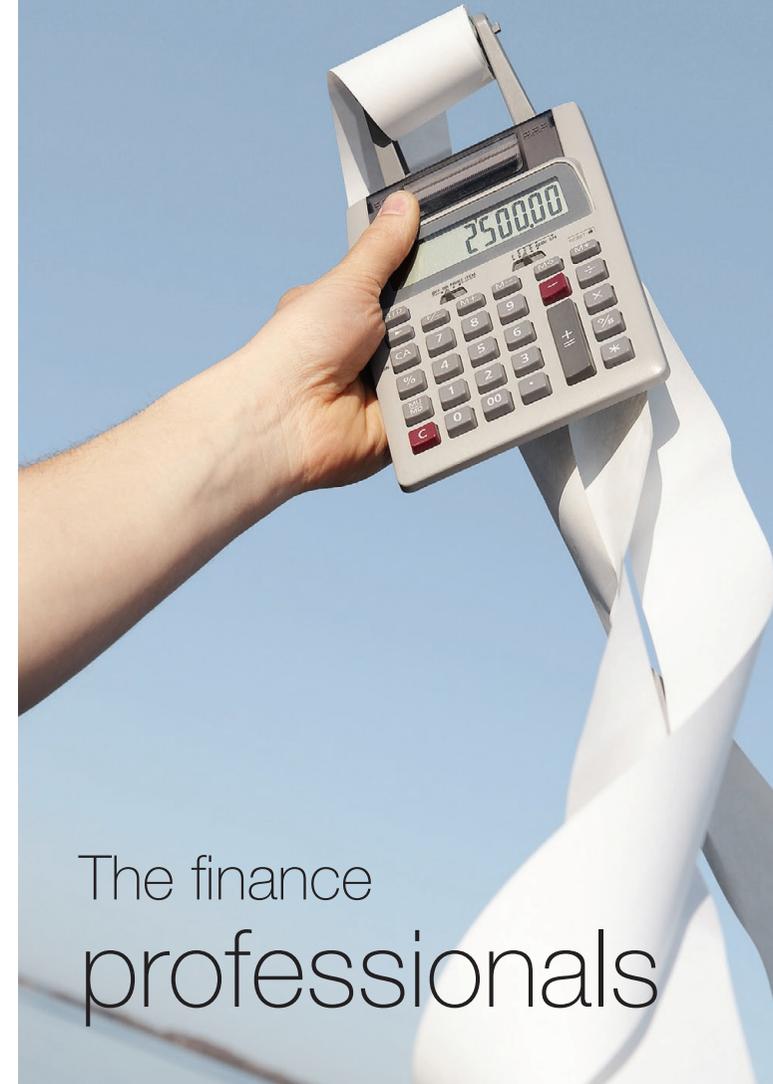
www.mtfinman.co.uk

Authorised and regulated by the Financial Services Authority

Independent Financial Advice
and Financial Management



Financial Management Ltd
Chartered Financial Planners



The finance
professionals



Why choose MT Financial Management Ltd?

Your money is important to you, so when you're looking for financial advice you want to know you're talking to a team you can trust to deliver a first class service.

MT Financial Management Ltd is the team you are looking for. Our highly qualified professionals offer expertise and experience in all aspects of financial advice including:

- Business and personal wealth strategies
- Investment planning
- Pensions
- Retirement planning
- Trusts.

How do I know I'm dealing with experts?

MT Financial Management Ltd was one of the first firms in the UK to gain Chartered Financial Planners status, which is awarded by the Chartered Insurance Institute (CII).

This prestigious status is awarded only to firms within the financial planning industry that satisfy rigorous qualification criteria, including continuing development and training of their staff, and signifies a commitment to delivering excellence in all aspects of customer service.

When you become a client of a firm of Chartered Financial Planners, like MT Financial Management Ltd, you will have the peace of mind of knowing that you will receive advice, support and services that:

- meet the demands of a code of ethical practice
- are of the highest professional standards
- are based only on your identified needs
- are provided by an advisor who works within their competency level.

We are proud of our Chartered Financial Planners status and demonstrate our commitment to its standards by supporting staff in their professional and technical development – in line with the standards of the CII and its Personal Finance Society faculty – to continuously update their knowledge and skills.

All our advisers are also highly qualified individually within the Personal Finance Society, an indication of their high level of technical knowledge and that they follow its Code of Ethics and Conduct. Failure to comply with the code carries disciplinary sanctions.

Who are their clients?

For more than a decade, MT Financial Management Ltd has been advising people like you, at all stages of their lives.

Financial planning is a wise move at any age, and particularly when you need to prepare for life's milestone events, including:

- Starting work
- Buying your first home
- Getting married and starting a family
- Starting a business
- Divorce
- Early retirement or redundancy
- Provision for ill health
- Retirement
- Passing on your inheritance.

What about our charges?

We offer our services on a fee or commission basis, or a mixture of the two, and will agree the details and basis of any charges before we provide you with our services.

Because we are independent of product providers, you can be sure that the advice we give you is unbiased and driven by what is best for you.



I'm interested - what do I do now?

If you would like to know more about how working with MT Financial Management Ltd can benefit you, please get in touch to arrange a free, initial consultation. You can use the tear-off reply card on the right, or contact us using the details on the reverse of this leaflet.

www.mtfinman.co.uk

Please contact me on a no obligation basis to discuss how MT Financial Management Ltd can help me.

I am interested in.....

Business and personal financial planning and advice

Inheritance tax and estate planning

Investment portfolio management

Pensions and divorce advisory service

Personal and business pension planning

Planning for retirement and beyond

Trust review service

Other (please specify)

Name:

Company:

Address:

Postcode:

Telephone:

e.mail:
