Financial Planners
Chartered

MMWealth
Chartered Financial Planners

Growing and preserving wealth
for you and your family

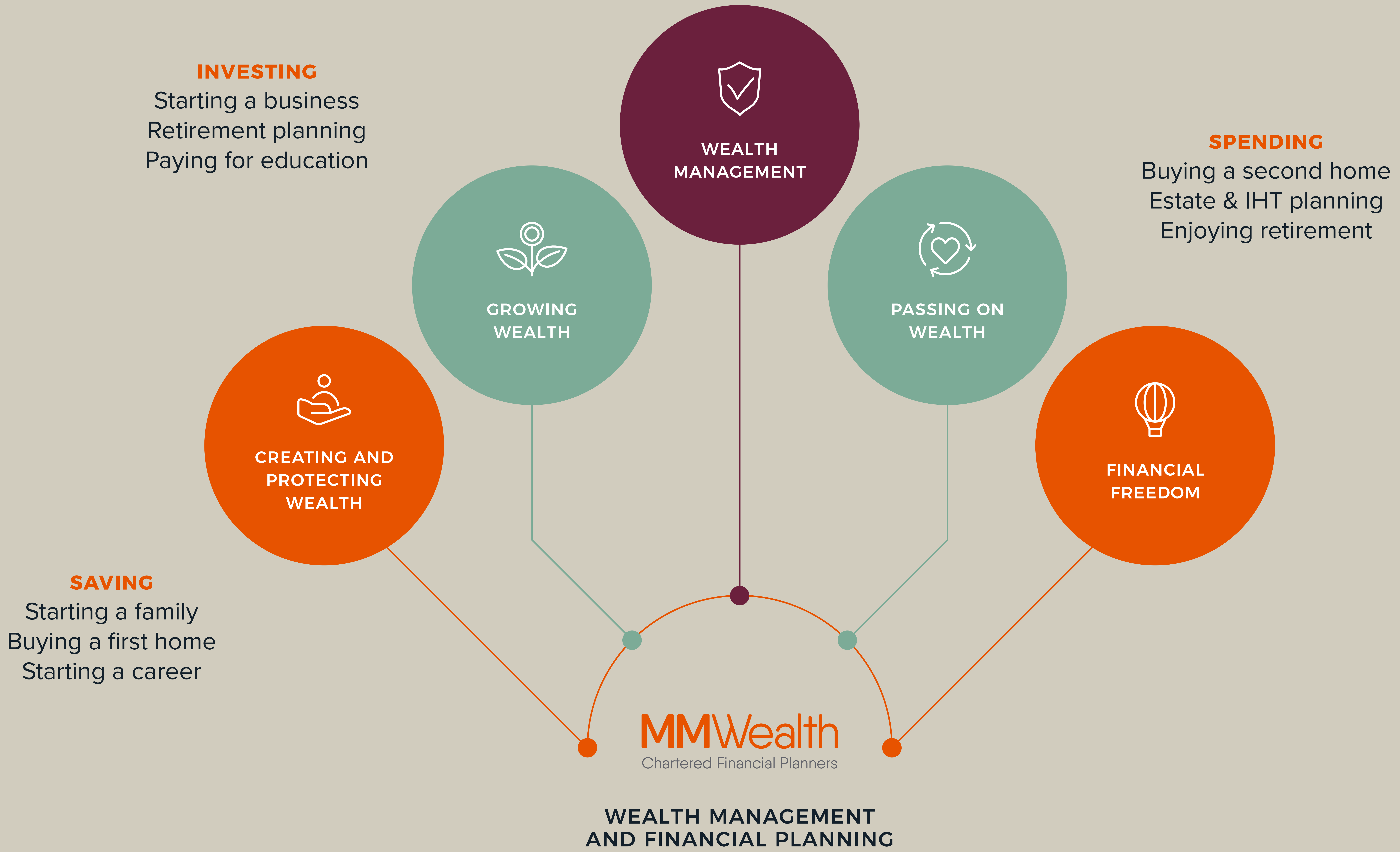
We listen to and understand your financial aspirations at every stage of your life

Our financial planners provide a holistic financial planning approach – taking into consideration where you are now and where you aspire to be in the future.

Knowing exactly where you are financially and planning ahead is key to establishing the financial security you want for you and your family.

Investing in your future

Whether you are looking to invest your money to buy a new home, pay for education or save for your retirement, we can help you manage your wealth in the most tax efficient way.


INVESTING
Starting a business
Retirement planning
Paying for education
WEALTH MANAGEMENT
SPENDING
Buying a second home
Estate & IHT planning
Enjoying retirement
GROWING WEALTH
PASSING ON WEALTH
CREATING AND PROTECTING WEALTH
FINANCIAL FREEDOM
SAVING
Starting a family
Buying a first home
Starting a career
MMWealth
Chartered Financial Planners
WEALTH MANAGEMENT AND FINANCIAL PLANNING

Giving you the confidence to fulfil your life the way you choose

Creating your wealth **matters**

Whether you have created wealth through running your own business or have received a windfall, we can advise you on effective ways to ensure your wealth enables you to achieve your goals.

Growing your wealth **matters**

How and where you invest your money can have a significant effect on your potential to grow long-term wealth.

Our team can help to plan the right investment strategy for you – one that aims to increase the value of your investments and net worth over time.

Protecting your wealth **matters**

Life insurance, critical illness cover and income protection play an important role in protecting your financial future, particularly if you have younger children or any other dependents.

Blending different types of assets and ensuring that you invest in different sectors and geographical locations can also help to preserve wealth for you and your family.

Looking after your family's wealth **matters**

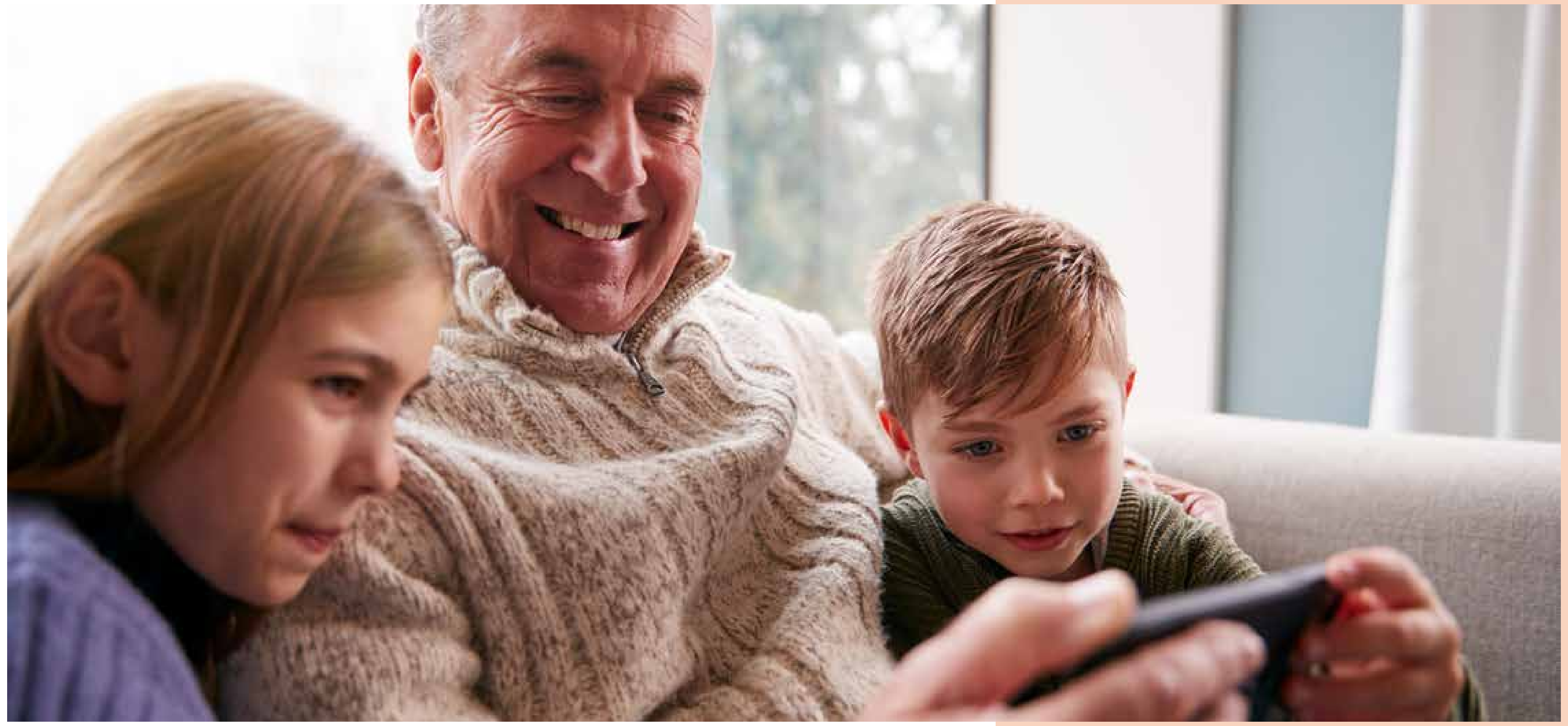
Building trusted relationships with our clients and their families ensures we continue to look after your family's wealth for future generations.

Involving children and grandchildren in conversations with your financial planner early helps to ensure that your aspirations and wishes are aligned with their future financial goals and needs.

Passing on your wealth **matters**

It is only natural that you will want to ensure your wealth remains intact and can be passed down to the next generation.

Effective estate and tax planning can play an important part in protecting your legacy and making sure your money ends up with the people you want, for the reasons you choose.



Financial Freedom **matters**

Achieving financial freedom means having enough savings, financial security and cash available to support the lifestyle you want for yourself and your family.

Family matters – we like to think we will be advising on and preserving wealth for future generations

Our holistic approach to financial planning

From advising you on protection and cashflow management, to preserving your wealth and managing your investments, whilst also providing guidance on pensions, estate planning and efficient tax planning initiatives.

We can help put in place the right financial plan for you.

YOUR FINANCIAL PLAN

CASHFLOW MANAGEMENT
- Assessing your financial needs now, and in the future
- Keeping you on track to meet your goals

PENSIONS & RETIREMENT
- Planning, saving and investing for your retirement

INVESTMENT PLANNING
- Matching your values to your financial goals

ESTATE AND INHERITANCE TAX PLANNING
- Planning with Wills and Trusts
- Gifting to others

FINANCIAL PROTECTION
- For you, your business and your family

WORKING WITH YOUR ADVISERS
- Liaising with your accountant and solicitor

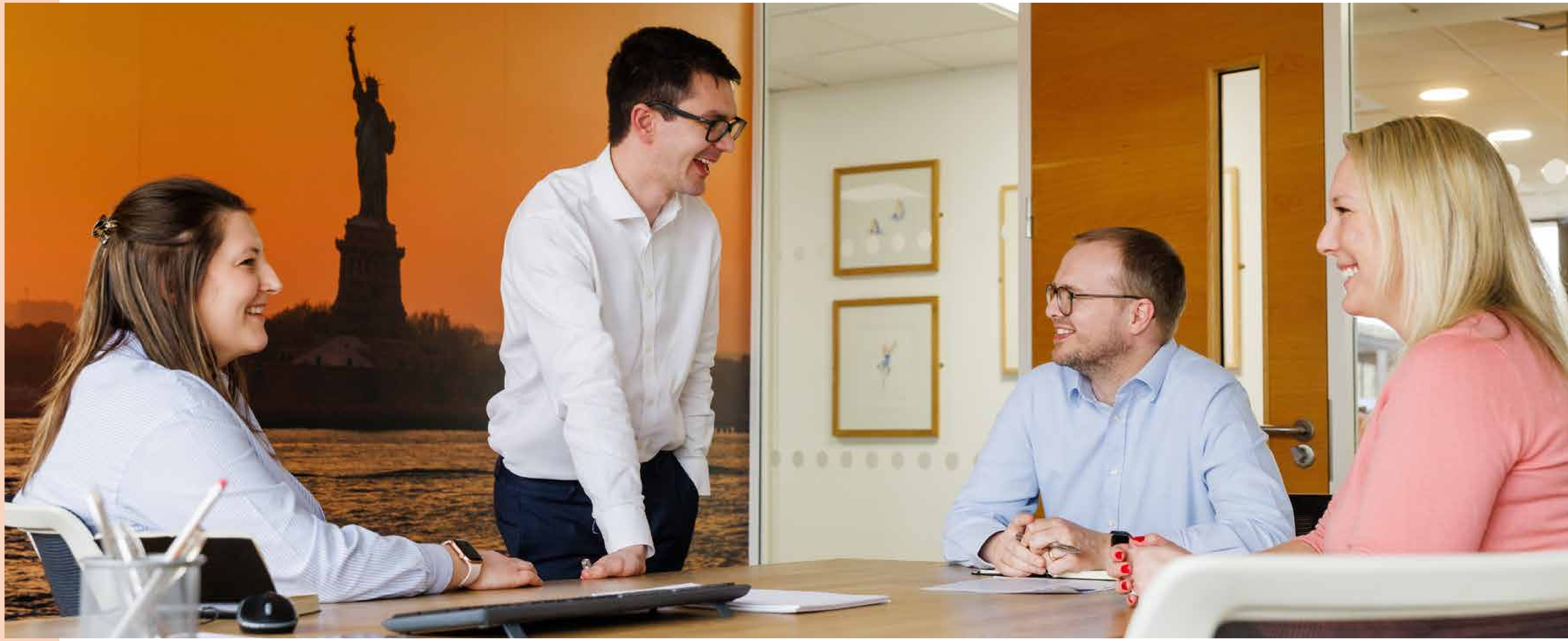
Chartered financial planners and wealth managers

We are a friendly and knowledgeable team managing and advising on in excess of £550 million for our clients.

As Chartered Financial Planners, we put our clients at the centre of everything we do.

Continually investing in our teams' expertise ensures we can provide the best possible advice, personalised to you, as and when you need it.

Our clients tell us that we are big enough to take advantage of new opportunities that can benefit them, but small enough that we do not lose the personal approach that really matters to them.



We are **100%** independently owned

Established in Cambridge in 1984 with clients nationwide, but with a focus on East Anglia, London and the South-East.

Being a truly independent firm allows us to provide clients with unrestricted, impartial advice.

Financial planning advice personalised to your needs

We will work with you to identify your broader financial goals – integrating protection, investments and tax and estate planning to provide a solution that considers the bigger picture.

WORKING WITH YOU

GETTING TO KNOW YOU

We offer you a complimentary initial meeting, to discuss your current situation and our services

DEVELOP A PLAN

Based on comprehensive advice to ensure that you make the right financial decisions

PUT YOUR PLAN INTO ACTION

A clear timetable of what we will do and by when

STAY ON TRACK

Monitor and review your plan regularly, providing updates and reports

Our financial planners are extremely well qualified and hold high level professional qualifications. The team have over 320 years' financial planning experience between them with the majority having achieved the much coveted Chartered status.

Why choose **MM Wealth**?

Our financial planners will be with you every step of the way, listening to your wishes. It is this level of understanding that allows us to provide recommendations that are in line with your aspirations.

- **Independent advice** on how best to structure your wealth to meet your goals
- **Specialist planning advice** including pre and post-retirement, long-term care, and estate planning
- **Advisory and Discretionary Portfolio Management Service**
- **CII Chartered Financial Planners** since 2016 – Chartered Financial Planners are a select group that meet the highest professional standards
- **A professional team** of over 30 people
- **Investment in our people** and their qualifications
- **Transparent fees** agreed upfront with you
- **Use of the latest technology**, whether it is analytical tools to provide the best advice or to provide clients with online personal portfolio data.

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Creating a sustainable future **matters.**
Talk to us about our investment options.

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Contact us

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Girton
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CB3 0NA

t **01223 233331**
e **info@mmwealth.co.uk**
w **mmwealth.co.uk**
mmwealth

If you would like a complimentary meeting with one of our financial planners, contact us on **01223 233331**

DISCLAIMER

Opinions constitute our judgment as of this date and are subject to change without warning. The value of investments, and the income from them, can go down as well as up, and you may not recover the amount of your original investment.

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