



40 YEARS IN BUSINESS
1984 - 2024

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

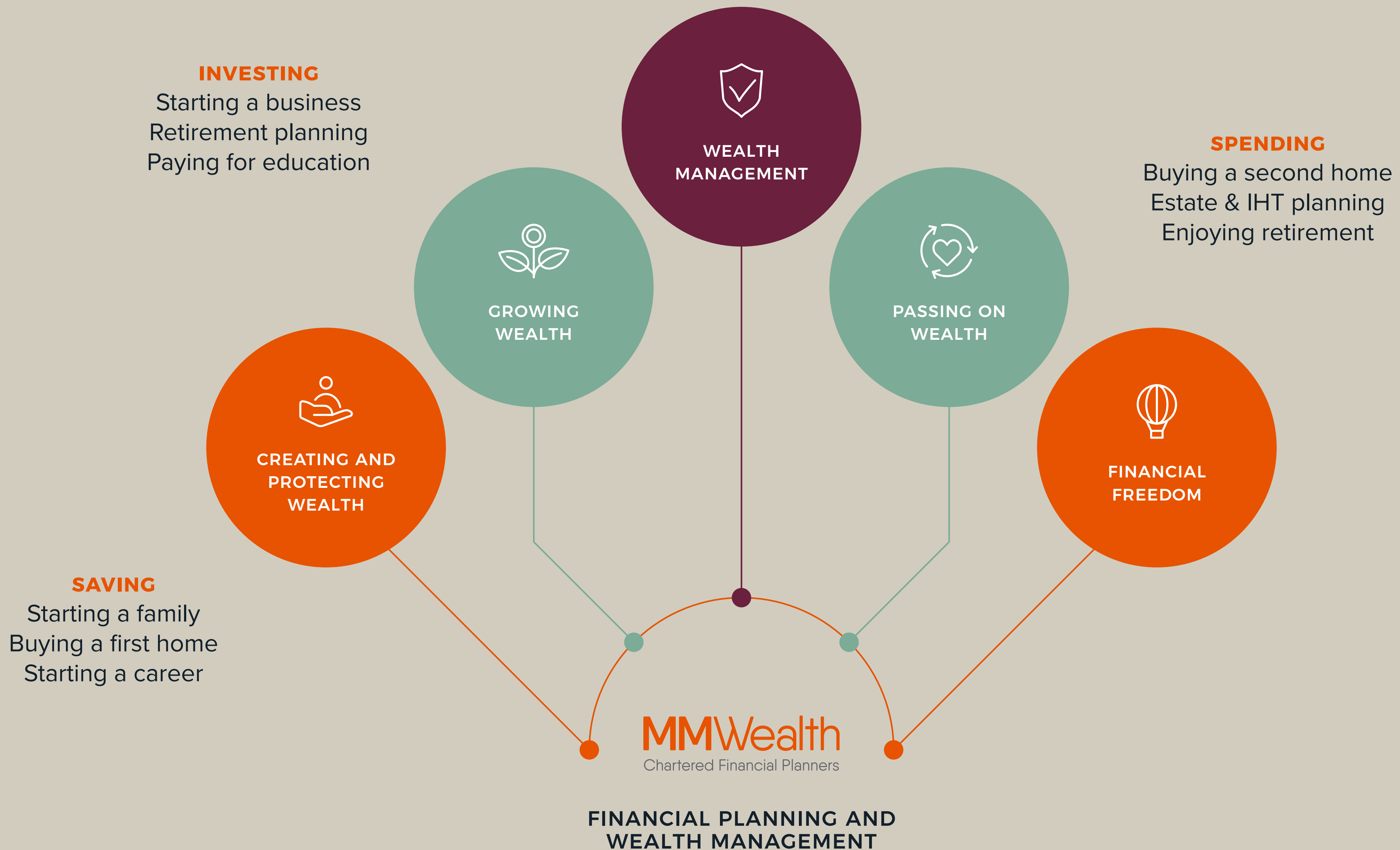
Our financial planners provide a holistic financial planning approach – taking into consideration where you are now and where you aspire to be in the future.

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.





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

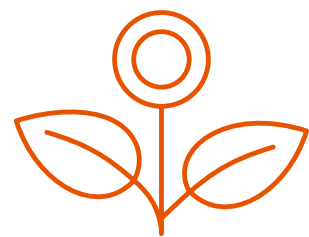
Creating your wealth **matters**



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**

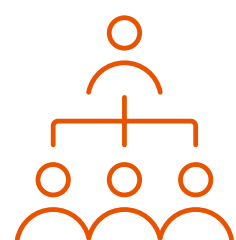


Life insurance, critical illness cover and income protection play an important role in protecting your financial future, particularly if you have younger children or any other dependents.

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**

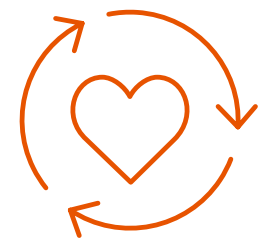


Building trusted relationships with our clients and their families ensures we continue to look after your family's wealth for future generations.

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**

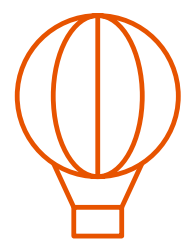


It is only natural that you will want to ensure your wealth remains intact and can be passed down to the next generation.

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.





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. We are proud to have been established since 1984 and have some existing family relationships that span over four decades.

We have been accredited as a Chartered firm since 2016 which is the highest level of certification awarded in financial services for our profession and this is a status of which we are very proud.

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**

Located in Cambridge 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



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



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



A clear timetable of what we will do and by when



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 all our financial planners achieving the much-coveted individual 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.





Talk to us about our investment options including our responsible and ethical investment solutions



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Contact us

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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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