"We are particularly pleased with the service we get and the way it's reported"

Client Survey 2020

BRI Wealth Management PLC

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BRI provides restricted advice. Whilst we offer advice on a wide range of financial products and services, where investment management services are suitable, we will generally recommend BRI's in-house discretionary or advisory investment services. However, we are not limited to using BRI and will only do so when we feel such services are suited to your needs and objectives.

For non-investment management services, we will establish your needs and objectives, then conduct a review of the wider financial planning market and recommend a solution, bearing in mind your best interests.

The price and value of investments and the income, if any, from them can fall as well as rise. Past performance of investments is not necessarily a guide to future performance. Changes in the rates of exchange may adversely affect the value of non-UK investments. BRI Wealth Management plc is authorised and regulated by the Financial Conduct Authority.

September 2021

INVESTORS IN PEOPLE

@BRIWealth

BRI Wealth Management PLC

A Guide To Our Services

BRI Wealth Management is Independently owned and established for over 50 years.

BRI provides high quality Wealth Management solutions to Private Clients, Families, Trusts and Charities.

Combining Investment Management and Financial Planning, we are able to offer an extensive range of services to clients.

Our Services

Investment Management
We specialise in creating bespoke portfolios tailored to your individual needs and requirements.

Pensions
(including stakeholder, personal pension, SIPPs and SSASs)
Our team of pension experts includes specialists in all areas of personal and corporate pension planning.

Tax and Estate Planning
We can advise you on inheritance tax issues and the protection of your wealth for future generations.

Protection
We employ specialists in both personal and business-related protection, helping clients organise their affairs in the most tax efficient manner.

Trusts
We have a comprehensive understanding of this complicated subject area, and work with clients and solicitors alike to put in place effective trust management arrangements.

Charities
We manage investments for a number of charities.

Long Term Care
If you have concerns about long term care and its expense, please contact us.

Divorce
We are able to advise you throughout the entire divorce process, and would encourage you to meet us at the earliest appropriate point to discuss how we might assist you.

Lifestyle Planning
BRI provides lifestyle planning for clients through a combination of innovative software systems and rigorously tested planning techniques.