

I HAD BEEN RETIRED FOR QUITE SOME TIME. AFTER INHERITING INVESTMENTS FROM MY LATE WIFE I DECIDED TO CONSOLIDATE THESE WITH THE OTHER INVESTMENTS I HAD ACCUMULATED OVER THE YEARS. I DIDN'T KNOW THE BEST WAY TO DO THIS, SO I SOUGHT ADVICE FROM MOUNT STERLING WEALTH.

The numerous investments that I had amassed throughout my life included PEPs, ISAs, Unit Trusts and Investment Bonds, several of which had begun many years ago. I was receiving multiple statements and I honestly didn't know where I stood or if they were still appropriate for my needs.

I sought advice from David from Mount Sterling Wealth. I explained my situation and what I wanted to achieve. He outlined their Financial Planning process and how they could help me to take back control: consolidating my holdings into one place and actively managing the underlying investments.

I found his approach to be very professional and informative. After a lengthy meeting, David delivered a detailed Financial Plan. It analysed my existing arrangements and outlined the benefits and drawbacks of various options. We discussed my plan in detail and agreed a way forward.

Mount Sterling Wealth recommended that I bring all of my investments under the auspices of Discretionary Fund Management through their strategic alliance with a market leading discretionary manager.

The whole process for implementing my plan was very simple. The client team at Mount Sterling Wealth managed the entire process from start to finish. They dealt directly with the providers and kept me informed every step of the way.

The outcome: all of investments are now held in the one place. They are diversified across many different assets (cash, fixed income, equities, property and alternatives) and actively managed on a discretionary basis.

I now understand how my investments work, the benefits of my new strategy and how it all fits together. I also have a single point of contact and receive just one set of statements. Online access to my account enables me to track the progress of my investments at the touch of a button.



“ Working with Mount Sterling Wealth, I finally feel like I'm back on control. My investments are consolidated into the one place, structured tax efficiently and in line with my objectives. It's a very simple and time saving solution for someone like me. ”

IS, YORKSHIRE

To find out how we can help you to consolidate and take back control of your investments, call the team at Mount Sterling Wealth on 0344 225 3111 or email theteam@mountsterlingwealth.com

Our clients value our discretion. For confidentiality reasons some of the information in this case study has been changed, including the client name.