

WE OWN AND OPERATE A RANGE OF GLOBAL COMPANIES. GIVEN OUR FUTURE GROWTH PLANS, WE WERE LOOKING FOR A FINANCIAL ADVISER WHO COULD ASSIST US IN IMPLEMENTING AN EMPLOYEE BENEFITS PACKAGE THAT WOULD HELP US TO ATTRACT, ENGAGE AND RETAIN OUR STAFF.

Friends of ours had worked with the team at Mount Sterling Wealth and highly recommended their services. They were impressed by their approachability, professionalism and expertise.

We arranged a meeting with Scott and David, onsite at our offices. They outlined their experience and talked us through their Financial Planning process. Immediately we felt comfortable that they could help us source an appropriate solution.

Following a series of meetings and discussions, where they took time to understand our business and overall objectives, they presented their recommendations. It was proposed that we introduce a Group Personal Pension scheme and a Death in Service arrangement.

On this basis we decided to proceed. We elected for the company to contribute 5% of each employee's salary per month into the Group Personal Pension scheme. We also invited the employees to contribute via salary sacrifice, creating tax efficiencies for the both the staff and the company. A Death in Service scheme was also established, covering four times the employee's salary.

Mount Sterling Wealth hosted a series of informative presentations onsite at our premises. They then met with each member individually, explaining the details of the schemes and answering specific queries.

The administration team at Mount Sterling Wealth implemented the schemes, without any interruption to the company. They acted both quickly and efficiently, and kept us informed throughout the process.

Since installing the new schemes our employees are more engaged and feel informed about their retirement options. They also have access to financial advice specific to their needs, whenever a need arises.

With regular communication and updates, we now know where we stand and that we have installed the most appropriate solution for our company and staff. The biggest benefit is that our schemes are flexible and can support our projected business growth, as we continue to grow the team. It's also a compelling proposition that we use as a real benefit to prospective employees.



“ We were incredibly impressed by Mount Sterling Wealth's high standards, attention to detail and technical expertise. We have no hesitation in recommending their services to any other company or individual in need of advice. ”

DH, DURHAM

To find out how we can help you to implement an employee benefits scheme in your business, 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.