

WE HAD RECENTLY RETIRED AND WERE LEADING AN ACTIVE LIFESTYLE, OFTEN SPENDING UP TO SIX MONTHS OF THE YEAR TRAVELLING ABROAD. WE WORRIED THAT WE DIDN'T HAVE TIME TO DEAL WITH OUR FINANCIAL INTERESTS AND NEEDED SOMEONE WE COULD TRUST TO MANAGE EVERYTHING WHILE WE WERE AWAY.

A close personal friend suggested we speak with Scott at Mount Sterling Wealth. He came highly regarded, having looked after their affairs for years.

We made contact and arranged an appointment. He explained the Mount Sterling Wealth Financial Planning process and how he could act as our Trusted Adviser, helping us to manage our affairs from anywhere in the world.

During the initial meeting we discussed the things that are most important to us. We wanted to maintain our active lifestyle, while mitigating the effects of Inheritance Tax and Capital Gains Tax on a property we had recently sold. We also wanted to work with someone we knew we could trust to manage our affairs and liaise with our Accountant.

He looked at our current investments and made recommendations for changes to our strategy, consolidating our holdings and mitigating tax. We discussed different tax efficient structures and offshore jurisdictions, and how these could be used for tax planning purposes.

After considering the different options available to us, we agreed our Plan and Scott made the necessary arrangements. He recommended that we appoint a discretionary fund manager to look after our investments and also made an introduction a strategic investment partner of Mount Sterling Wealth.

The discretionary manager has created a bespoke portfolio in line with our objectives and attitude towards risk, which they actively manage on an ongoing basis. Regular updates and review meetings (occasionally hosted remotely when we are travelling) ensure we always know exactly where we stand and how our investments are performing.

We're grateful to have a Trusted Adviser looking after our affairs. Our core portfolio is diversified across a number of different investments and not exposed to unnecessary risk. We're also managing our tax liabilities and looking forward to leaving a lasting legacy for our daughters and their children.



“Appointing a Trusted Adviser has taken away the worry. Wherever we are in the world, we know that Scott is just a phone call away. His relationship with our daughters gives us comfort that they will be well looked after too.”

HG, SUFFOLK

To find out how we can help you to manage and administer your wealth, call a member of the Mount Sterling Wealth team on 0344 225 3111 or email [theteam@mountsterlingwealth.com](mailto: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.