



A NEW OPPORTUNITY

Karina and Tim

CAPITAL ASSET MANAGEMENT

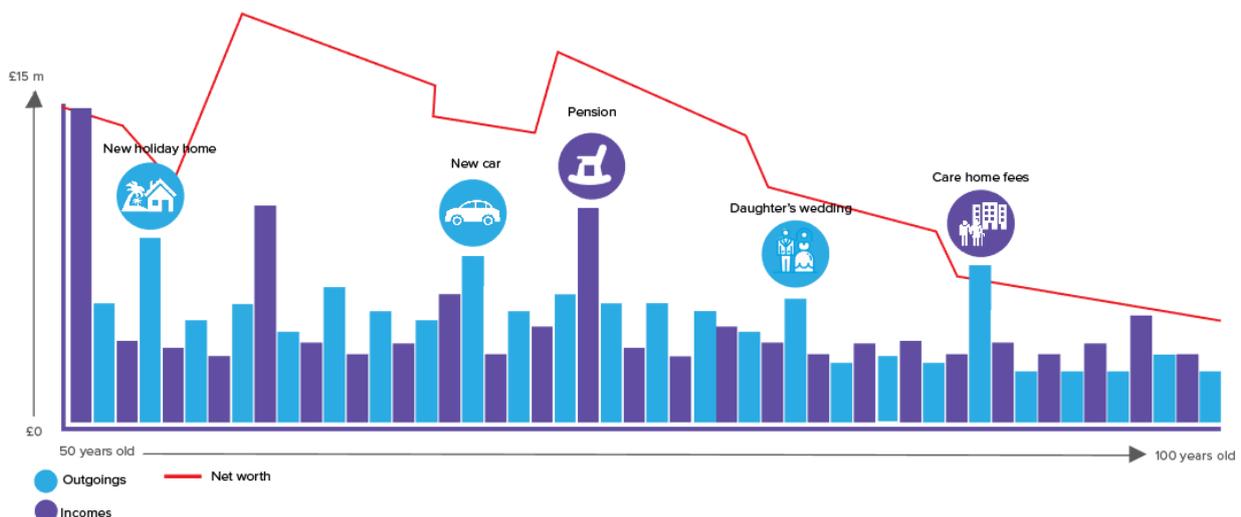
Karina writes teen books and Tim is a company director of an upmarket auto business. Their children are grown up and they now live mortgage-free by the river.

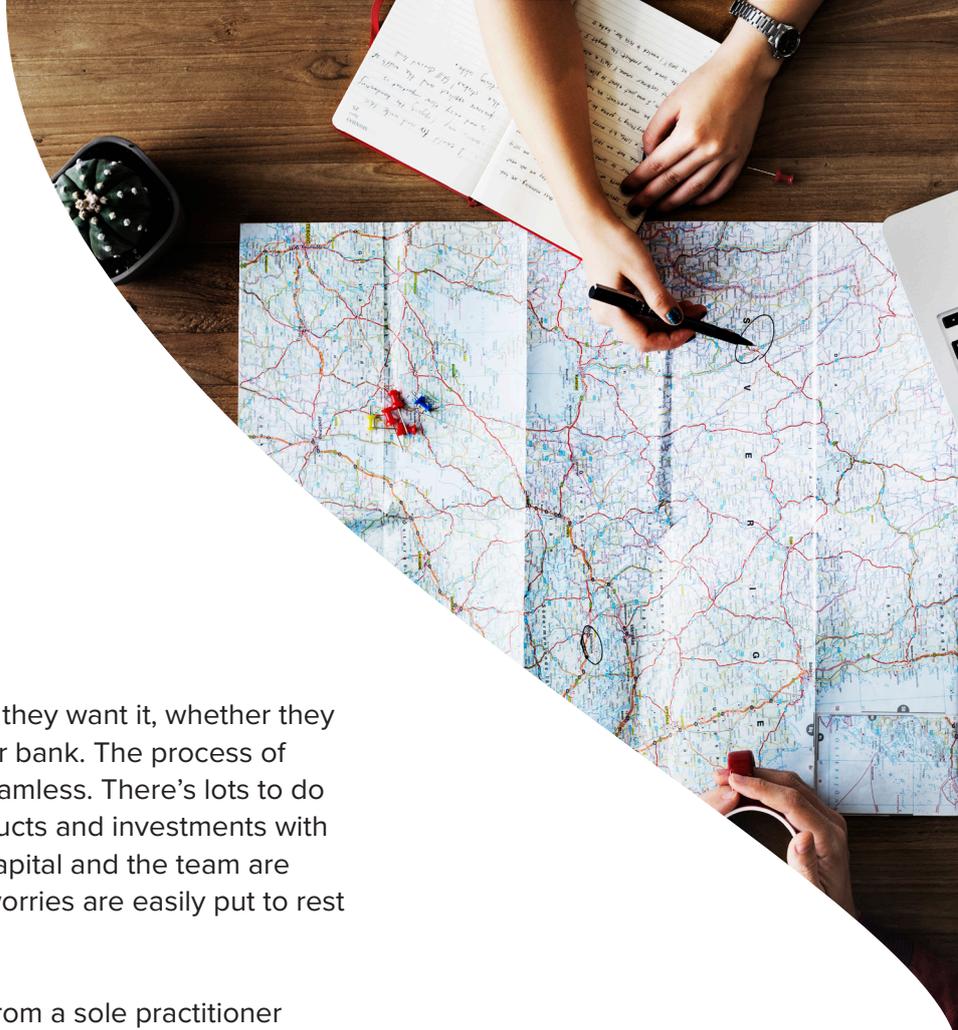
Their savings and investments are strong, they enjoy foreign travel and for the last 20 years they've worked with a local IFA. As they both approach retirement, things are working out ok.

Then something unexpected happens. A major publishing company wants to serialise Karina's teen books, backed by a television series. The deal could be worth millions. It's amazing news, but it's also unsettling – on the one hand the banks are suddenly very interested, on the other, their IFA feels out of his depth.

At this point they're introduced to Capital. They're just seeing what's out there, so they have a meeting with the advisory team, after all, it's free, so why not? It goes well, so they decide to have more meetings and they soon realise that Capital's take is very different – this isn't about money first, it's much more life-centred. This time it's all about values, ambitions and priorities. Trust is gained and bonds are built.

Capital shares Tim and Karina's personalised FutureMap™, a visual representation of their future life to age 100. It makes total sense and they're impressed with its elegant simplicity. All the options are included – gifts to the children, creating a charitable foundation, enhanced living budget, new cars. It's all there and for a flat-fee-for-service too. It represents true financial independence and freedom.





Now they have to decide whether they want it, whether they say 'yes' to Capital and 'no' to their bank. The process of transition, while beneficial, isn't seamless. There's lots to do and they own many different products and investments with a wide range of companies. But Capital and the team are managing the transition and any worries are easily put to rest with a phone call.

Tim and Karina have now moved from a sole practitioner handling ISAs and pensions to an award-winning Corporate Chartered Financial Planning firm that focuses on financial life management. It's a fresh start, with peace of mind and less paperwork. It's an easier life and a burden removed.

Tim and Karina reflect on what might have been if they hadn't met Capital. They'd probably still be in the dark about their investments, returns and taxation as well as charges and fees. Now they have their own lives settled, there's provision for helping others, Karina is happily writing and Rob supports her 100%. They've discovered True Wealth.

If you would like to discover how we can help you, contact us today to arrange a meeting with one of our Chartered Financial Planners on 0207 398 6600.



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