

**W**hen it comes to planning and looking after the ideal garden, everyone has different priorities. The same principle applies to your financial planning and, like your garden, you'll want to include particular features that satisfy your personal needs, both now and in the future.

For the past 40 years, P W White & Partners Ltd have been advising clients on ways to improve their investments in order to meet their personal objectives whilst maintaining financial security. We have now introduced a major step forward in this service, which we are confident will offer you far greater flexibility of choice and the greater probability of success.

To find out more about our Financial Life Planning services, give us a call on 01494 434 544 or use our contact details below.

# WHO CARES ABOUT YOUR GARDEN?



**P W WHITE  
& PARTNERS  
LIMITED**



P W White & Partners Limited Apex House 31 Chiltern Avenue Amersham Bucks HP6 5AE  
Tel: 01494 434 544 Fax: 01494 434 644 Email: [lifeplanning@pwwpl.com](mailto:lifeplanning@pwwpl.com) [www.pwwpl.com](http://www.pwwpl.com)  
*Authorised and Regulated by the Financial Services Authority*

## Sowing the Seeds of Success

**P**W White & Partners Ltd are a family oriented firm of Insurance Brokers, and Financial Advisers located in Amersham for 40 years. For most of that time we have been advising clients on how to plant their investment gardens so that they will fully bloom.

As you'd expect, we offer a highly professional service, and as a well-established firm, we have grown with our clients to become more like long-standing friends with whom we enjoy a one-to-one, comfortable, friendly relationship based on trust.

Ours is a clear, courteous and personalised service, designed to meet your particular requirements. Initially, we listen, get to know you and establish your values, lifestyle, aspirations and goals – both now and for the future. And then we're ready to 'clear out any rocks and weeds' and make recommendations designed to minimise costs and taxes – always bearing in mind the importance of your financial security.

## Cultivating Your Perfect Lifestyle

**H**ow often have you stopped to reflect on how you want to spend the rest of your life? Do you make plans and almost immediately change them, because you've suddenly been hit with an unexpected demand on your finances?

It can happen to us all, no matter how well-organised we are. By taking considered, objective, professional guidance before making decisions, you can potentially prevent future shocks and have profound and far-reaching positive effects on your wealth.

## New Ways to Make Your Garden Grow

**P**W White & Partners Ltd are continually looking at ways to improve. We have now introduced a major step forward in the service that we have successfully traded in for 40 years.

Our Financial Life Planning Service is a flexible, bespoke service which will be tailored to your future, as well as your current, requirements. Whether you come to us as a private client or as a business owner, this relationship serves your needs and your goals.

Our clients enjoy a close relationship with their P W White & Partners Ltd Personal Finance Director, who will regularly monitor your financial affairs and assess them in line with your goals. We are confident that it will offer you far greater flexibility of choice and the greater probability of success.

Members of our team are available to discuss your financial plans and take the time to learn about your future ambitions. To arrange a mutually convenient meeting, please contact our Financial Life Planning Team:

t: 01494 434 544

e: [lifepanning@pwwpl.com](mailto:lifepanning@pwwpl.com)



**P W W H I T E  
& P A R T N E R S  
L I M I T E D**



### Case Study

*A local business owner approached us to advise him on his ongoing responsibilities with regard to Stakeholder pensions for his staff. After dealing with his initial request he asked for some basic advice about his own pension scheme.*

*Our method of working with clients opened up many discussions with this client as he had never really related his personal goals to those of his company. He had never seen the company as the vehicle to achieve what he really wanted in his personal planning.*

*With our personal Cashflow modelling and Financial Life Planning advice we helped the client gain some new focus and set down his personal aims, such as maintaining his lifestyle in retirement, ensuring that he could afford to pay for his children's university education as well as paying off his mortgage before he retired.*

*All of this meant that we were able to structure his planning so he didn't take as much risk in his personal life as he was willing to in his business life.*

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[www.pwwpl.com](http://www.pwwpl.com)