

Just a few of the projects that kept MBS Graphic Design busy in 2011. A big thank-you to our clients, suppliers and supporters. We look forward to creating more eye-catching communications throughout 2012!

7 DAYS
7 DAY SERVICE

In view of feeling of our spe 7 day tu
For details of this Mark Traynor o

established

0131 555 3552
www.alexquinn.co.uk

◀ Delegate pack for AQP roadshows including; specialist 7 DAYS service postcard, branded notepad, branded pen, folder and mini-brochure.

▶ Branding proposals for Lifeflow web project. "Wheel of Life" illustrations by Peter Seal.

lifeflow
TAKE CONTROL OF YOUR LIFE



As the profession enters a new era, the on-going education and training of our best financial planners is paramount.

ace / ACADEMY for COACHING EXCELLENCE

▶ International Academy for Coaching Excellence's "Coaching for Financial Planners" brochure.

PATCH MANAGEMENT

it500
.co.uk

INCREASING PRODUCTIVITY - REDUCING COSTS

▶ Series of eight inter-related IT case study brochures.

▶ Branding consultancy for Wealthflow LLP website. Web design and build by Eskymo New Media Design.

▶ Brochure design for Wealthflow LLP's specialist services.

WEALTHFLOW
Your wealth management partner

Wealthflow LLP provide a comprehensive service to clients throughout Scotland.

The financial planning and investment services offered by Wealthflow are always linked to client needs. From pre-shipment expertise including the establishment of bespoke spending plans through to the use of trusts and investment planning, our skill is in helping clients and trustees; reduce tax liabilities, manage financial risk, and above all, avoid running out of money.

In law, calculation of the amount of personal injury lump sum damages appears to be straightforward, the concept being to provide not a penny more, not a penny less over the period of the loss. There are however a number of practical problems:

- Pursuers may live longer than expected
- Pursuers may not achieve sufficient return on their money
- Pursuers may not have recovered the full value of their damages
- Pursuers may spend more or indeed less than anticipated
- Tax can reduce the pursuer's investment return.

The list is not exhaustive and individual circumstances will change. Financial planning and lifetime cash flow modelling can be used to address these issues.

The Wealthflow Clinical Negligence and Personal Injury Proposition meets the needs of this highly specialised area of financial planning and investment management.

The Financial Services Authority does not regulate tax advice or trusts.

The Wealthflow Consultative Process

DISCOVERY MEETING
Each client is unique and so the purpose of this meeting is to find out what is most important to them. Our service goes beyond investment management and into the realm of discovering clients most important values, relationships and living objectives.

INVESTMENT PLAN MEETING
From what we learn in the discovery meeting, we prepare an Investment Plan and an Investment Policy Statement. We present a detailed road map that will maximise the probability of achieving everything that is important to the client.

MUTUAL COMMITMENT MEETING
At this point, a mutual decision on whether Wealthflow can help clients achieve their spending plan will be made. With the all important background information and goals we can now agree to implement the investment plan recommendations.

45 DAY FOLLOW-UP MEETING
The meeting helps explain and organise the financial paperwork. Following implementation of the investment plan a significant amount of wealthflow assets that the practitioners don't become over-reliant on for their clients.

WEALTH MANAGEMENT PLAN
Wealthflow work with a team of carefully selected experts to create the most appropriate Wealth Management Plan for our clients including Advisory or Discretionary investment management services.

REGULAR PROGRESS MEETINGS
Scheduled as year-end reviews to our clients, regular progress meetings allow us to review any changes in circumstances and determine if/when adjustments to the Wealth Management Plan are needed. We review progress towards our client's long-term financial objectives.

▶ Presentation folder for Serenity Financial Planning

Serenity
Financial Planning

a partnership that allows you to take life in your stride

Serenity Financial Planning is authorised and regulated by the Financial Services Authority, number 432299.