SOVEREIGN
WEALTH

POWERING FUTURES

Creating a better financial future
for families across the UK

It isn't the amount of wealth that matters most. It's what you do with it that counts.

We are Sovereign Wealth, one of the UK's leading wealth management and financial planning organisations.

With our help, your wealth becomes the fuel that powers your future – a means of enjoying the life you want and looking after those you love. Whatever your goals and wherever you are in life, we build a financial plan that's fit for the weeks, months and years ahead.

OUR STORY

Working together for a better future

Sovereign Wealth was founded in 2009 with the belief that 'Together We Prosper'.

This means we believe that by bringing together the right adviser for the right client and offering the best services and solutions available, we can provide an industry-leading service that powers prosperity for our clients.

This collective approach has distinguished us from our peers and aided our rapid growth to becoming one of the largest Principal Practices within St. James's Place Wealth Management. Our regional coverage stretches from the North East to East Anglia.

We work with clients from many backgrounds and industries, from sports professionals to medical experts, and from lawyers to business owners. The common theme is that our clients all want to work with the best advisers in the business and understand the value that our advice can bring. We forge strong relationships built on a foundation of trust, mutual respect and expert advice.

From day one, we have invested heavily in technology and see the future for our industry being led by a balanced blend of traditional personal service facilitated by innovative technology. Our My Advice Portal is an example of our commitment to making personal service fit for the 21st century, allowing you to have a one-on-one meeting with your adviser on a secure, video conference. You can exchange files and sign off recommendations – all from one safe, easy-to-use portal.

As we continue to expand and grow, we are welcoming new clients every day. We look forward to continuing to deliver best-in-class service to help our clients secure their financial future and enjoy their prosperity.

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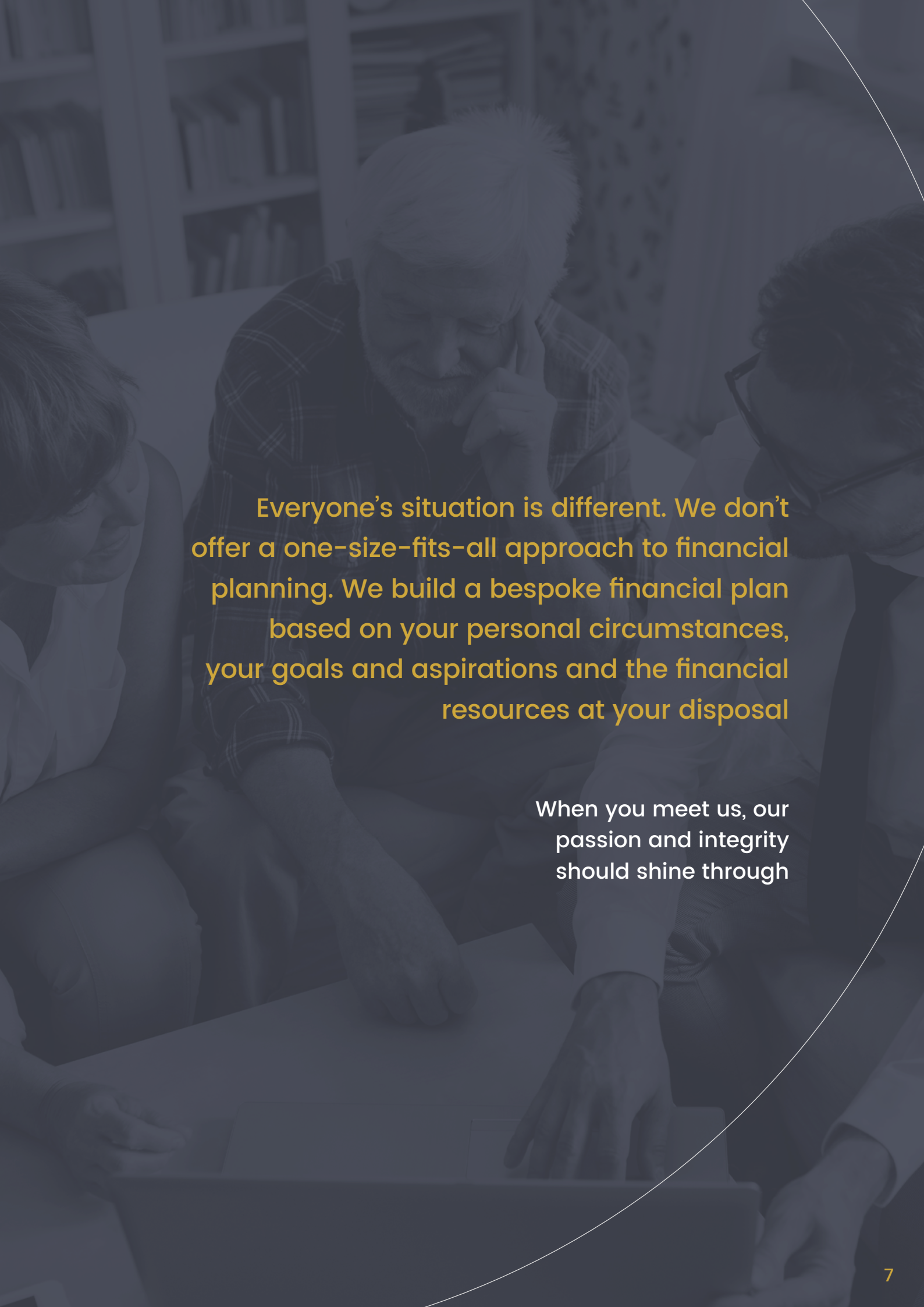
Here for you

Our team is here to take care of you

A strong personal relationship is the firm foundation on which every financial plan is built. All our advisers are experts in their field – in understanding how to unlock your wealth's potential to achieve your aspirations and goals. But more than that, they are friendly individuals committed to getting to know you personally, because only then can the plan we put together truly reflect who you are.

- Our network of expert advisers reaches across the UK
- We are friendly, approachable and always ready to help
- We help you understand every detail of your plan
- We listen and respond to your feedback



Everyone's situation is different. We don't offer a one-size-fits-all approach to financial planning. We build a bespoke financial plan based on your personal circumstances, your goals and aspirations and the financial resources at your disposal

When you meet us, our passion and integrity should shine through

A commitment to creating prosperity

From the very first meeting, we listen carefully, learn about who you are, and build a financial plan designed to help you achieve your goals.

We do it day in, day out, over and over – and it's why our clients recommend us again and again. But behind our approachable expertise and our specialist skills lies a deeper drive – a commitment to create prosperity for all our clients. Through this prosperity, we help individuals, their families, their colleagues and businesses achieve more in life and build the thriving futures they deserve.

We're driven by our commitment to creating prosperity for clients

We strive to be the best in the business

Our advice takes account of all your financial needs

Through long-term relationships we build confidence and trust

Providing peace of mind

As a Principal Partner Practice of St. James's Place Wealth Management, you benefit from our personal service backed by a FTSE 100 company. St. James's Place guarantees the suitability of the advice given by members of the St. James's Place Partnership when recommending any of the wealth management products and services available from companies in the Group, more details of which are set out on the Group's website at www.sjp.co.uk/products.

ST. JAMES'S PLACE
WEALTH MANAGEMENT

What we do

FINANCIAL PLANNING

Effective planning to create the future you want

What will your future be like? It can be easy to think of the future as being unknowable, but planning ahead can smooth out many of the uncertainties and help your goals and aspirations become reality. When we work with you, we always encourage you to consider the future you want – and then we help make it happen.

- Identify goals and aspirations
- Make important decisions today
- Look after those you love
- Look forward to the future with confidence

INVESTMENT PLANNING

A sound investment in your future

Investing for the future is fundamental to most people's financial plans, but understanding how, why and what to invest in requires specialist expertise. We understand that your ideal investment strategy depends on many factors, but by getting to know your reasons for investing and your attitude to risk, we can give you the comprehensive advice you need.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

- Understand your investment options
- Spread your investments across the most appropriate assets
- Make the right choices for you and your family
- Build a balanced, diversified investment solution

RETIREMENT PLANNING

Preparing for a richer retirement

Most people like to look ahead to an enjoyable retirement. For many, it represents the stage of life that will give them time and space to pursue their personal passions. But it takes planning to achieve the retirement you want, and not everyone has the foresight to make the right choices today.

- Prepare for the future you want
- Optimise your financial arrangements today
- Plan for life's ups and downs
- Look forward to retirement with confidence

LEGACY PLANNING

Making sure your intentions are carried out smoothly

Although you may have firm ideas about who will benefit from your wealth in the event of your death, making sure your intentions are carried out smoothly can be complex.

All kinds of events can end up knocking your plans off course, and it takes expert advice to make sure your wealth is protected for future generations.

Our team guides you through the process of planning the legacy you will one day leave behind. We consider the effects of inheritance tax and the possibility of unexpected events, making sure your wealth is retained and protected for those you love.

The levels and bases of taxation and reliefs from taxation can change at any time. The value of any tax relief depends on individual circumstances

- Make sure your wealth is passed on in the way you want
- Minimise inheritance tax and capital gains tax
- Create a legacy that passes to multiple generations
- Protect your estate and assets

CORPORATE SERVICES

A firm financial footing for your business

Running a business is hard work, and it's important to ensure your passion and commitment are creating financial security. You and your employees all rely on your business, and taking steps to secure its financial future is all part of being successful at what you do.

- Secure your business's financial future
- Look after your finances and those of your employees
- Build a stronger, healthier business
- Feel confident that your business is well prepared for success

PROTECTION PLANNING

Protection for you and your loved ones

We can't see into the future, but we can help you plan for events that might happen and that could have a major impact on you, your family and your wealth. By understanding your situation in detail, we can help protect you from life's many storms, both minor and major.

- Prepare for life's uncertain events
- Protect your wealth from excessive tax liabilities
- Shield your income from the impact of illness
- Protect your loved ones if anything happens to you

How we work

Personal service with a modern approach

You deserve the best, that's what we strive to deliver.

We are a well-established business with a large and loyal client base, but we don't rest on our laurels. Continued investment in technology, training and knowledge keeps us at the forefront of the wealth management industry and means our clients trust us to manage their wealth with care and attention.

A SERVICE BUILT AROUND YOU

Personal financial advice you can trust

- Consultation
- Strategy
- Plan
- Launch
- Review

Why choose Sovereign?

Award-winning

Leading the way in wealth management

We are a Principal Partner Practice of St. James's Place Wealth Management, a FTSE100 businesses and one of the leading wealth management company's in the UK. St. James's Place has received regular recognition for their work, such as Wealth Management Company of the Year at the City of London Wealth Management Awards in 2020.

Established

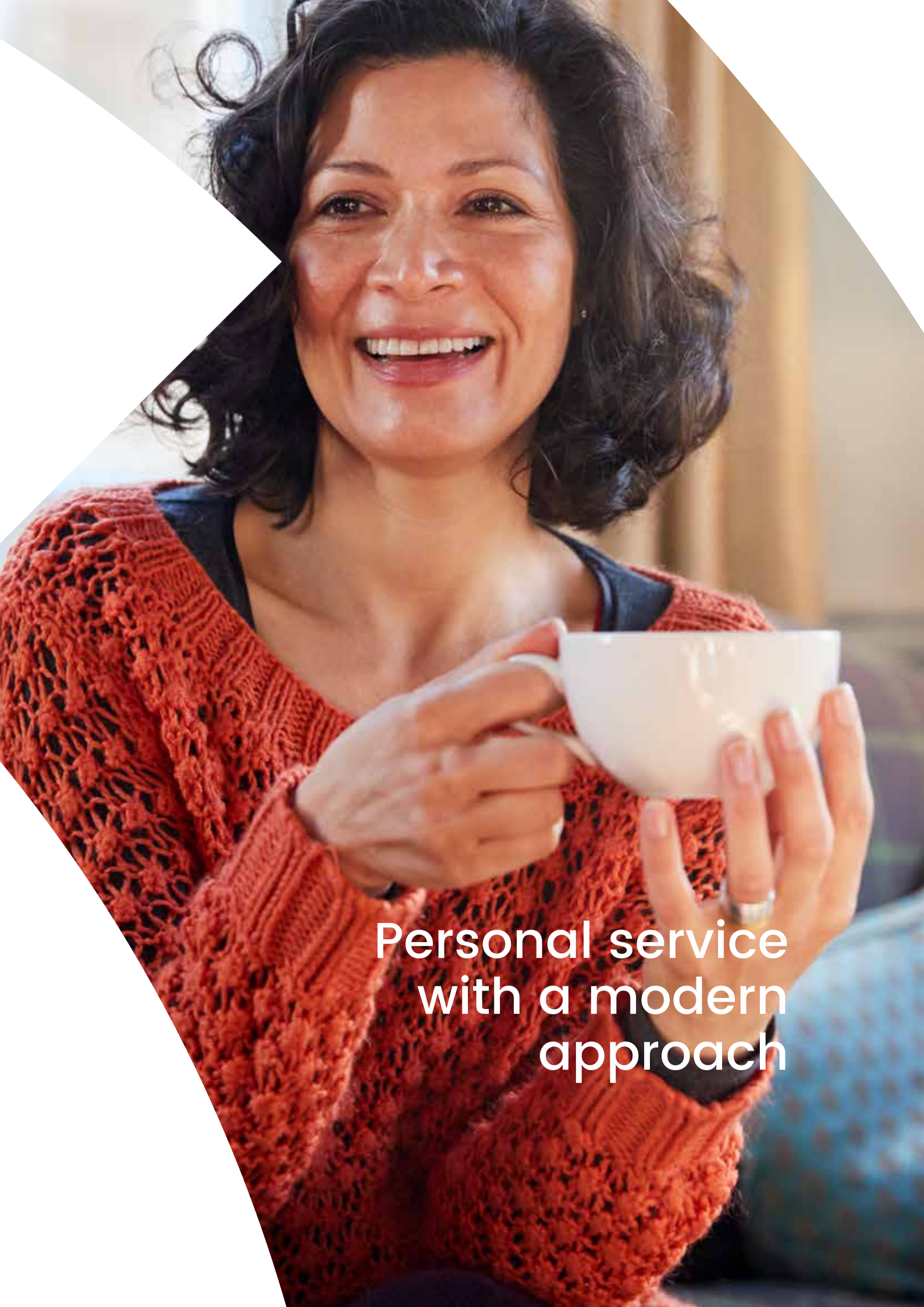
A fast-growing business with a proven track record

With a decade of success under our belt, we now help over 7,000 clients with over £1.3 billion of funds under management and have a network of over 30 expert advisers around the UK.

Certified

Driven to achieve the highest standards in our industry

We are committed to achieving the highest standards. All our advisers have a programme of professional development through leading certifiers such as the Personal Finance Society and the Chartered Insurance Institute.



Personal service with a modern approach

Together We Prosper

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