

Hart Shaw Financial Planning Limited

Europa Link, Sheffield Business Park,
Sheffield S9 1XU

Telephone: 0114 251 8870

Facsimile: 0115 986 6306

info@hartshawfp.co.uk

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Exceeding your expectations

Hart Shaw Financial Planning provides comprehensive and independent financial advice, serving personal and corporate clients since 1998.



www.hartshaw.co.uk/fp

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This joint venture company combines the experience and expertise of Russell Ulyatt Financial Services and Hart Shaw Chartered Accountants, to develop personal relationships and provide support when it really matters.

In stark contrast to the world of faceless call centres, Hart Shaw Financial Planning is driven by a desire to exceed clients' expectations. Instead of a one-size-fits-all approach to financial advice, we work with you to find a mutually beneficial solution, whilst our fee-based service means you will not receive the 'hard sell' – just sound, considered and professional advice.

Client Services:

Retirement planning

Planning for retirement can be a difficult and time-consuming task, as information is often hard to acquire and difficult to understand.

Why not simplify the process and avoid any nasty surprises when you reach retirement, by allowing us to help you plan for your future?

Drawing on your pension is equally complex and it is essential that you seek sound financial advice to minimise tax, maintain flexibility and provide an income for you and your dependants.

Hart Shaw Financial Planning is a specialist in self-administered pensions, which allow you to invest in commercial property and provide loans back to a sponsoring employer. Contact us for further information.

Pensions and employee benefits

We can provide advice to businesses and arrange benefits packages that are financially rewarding, tax efficient for you and your employees and meet all current legislative requirements.

Specialist financial planning is available for directors and staff, whilst we can also advise on other company benefits, such as life insurance, income replacement, critical illness cover and private medical insurance.

Protection

Let us arrange cover to protect you and your family or business against loss in the event of a death, critical illness or long-term injury. We can also arrange private medical insurance and protection to mitigate the effects of inheritance tax.

Wealth management

Everyone knows that a diverse investment portfolio helps reduce the financial risk, but spreading your interests across a number of companies generates mountains of paperwork and makes it harder to obtain an up-to-date valuation.

Wouldn't it be helpful if there was a simple and reliable way to keep track of your investments?

Thanks to the Hart Shaw Financial Planning Wealth Management programme, you can now see the total value of your pensions, investments and savings in one place, view your current asset allocation and work out how much you are paying in tax and charges.

Benefits at a glance:

- Discounts on funds as they grow
- An overview of your affairs
- Frequent reviews
- Online access

Inheritance tax planning

An increasing number of families are likely to face a significant inheritance tax bill when a loved one dies, unless a strategy is put in place to address the problem.

With sensible, legitimate planning, it is usually possible for us to reduce or even remove any inheritance tax burden, by guiding you through the most effective way to secure your family's future.

The most strategic and personal financial decisions in a rapidly changing financial market require professional advice.

MD, South Yorkshire

For further information about Hart Shaw Financial Planning's service, visit our website: www.hartshaw.co.uk or contact Kevin Jow on (0114) 251 8870 kevin.jow@hartshawfp.co.uk

Hart Shaw Financial Planning Limited is an Appointed Representative of Russell Ulyatt Financial Services Limited (1 The Triangle, ng2 Business Park, Nottingham, NG2 1AE, Telephone: 0115 9075100) which is Authorised and Regulated by the Financial Services Authority.

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