Provident Solutions

Wealth Creation & Wealth Management
Financial Lifestyle Planners

At Provident Solutions we believe that professional financial advice can add significant value to individuals and businesses. It is because of this belief that we provide a comprehensive ongoing review service designed to create real value for our clients.

As your partner in building wealth and security, we focus on ways that we can help you to live the life that you want to live. Our Lifetime Financial Planning Service enables you to define and achieve your financial goals and objectives, helping you plan for a secure financial future. Assisting you in setting your goals is the first step to success as it provides focus and direction for all future decisions. By engaging Provident Solutions you assure yourself of regular financial checkups and access to new ideas on a regular basis. Choosing a financial partner is one of the most important decisions you will ever make. Take your time, choose wisely, and we hope that we can earn the right to work with you into the future.

The Provident Solutions Lifetime Financial Planning Service

An Annual Review Meeting With Your Adviser Including	• A Complete Review Of Your Financial Strategy • The Provident Solutions 12 Point Financial Health Check
Unlimited Telephone & Email Access To Your Adviser	
Unlimited Face To Face Access To Your Adviser Between Review Dates	
The Portfolio Construction Service:	• Using A Scientific Risk Profiling Methodology • Design Of A Suitable Asset Allocation • Portfolio Design and Construction
The Portfolio Management Service	• Online Access To Portfolio Valuations • Portfolio Monitoring • Re-Weighting of Asset Allocation To Benchmark • Written Portfolio Valuations On Request
The Priority Response Service	• Phone Calls & Emails Returned Within 24 Hours
The Pensions Service	• Pensions Advice • Retirement Planning Strategy • Pensions Consolidation
The SIPP Service	• Value Added Strategies Using Self Invested Personal Pensions (SIPP's) • Specialist Advice For Owning Business Premises
The Life Insurance & Health Insurance Review Service	
The Mortgage Review Service – Including Equity Release Planning	
The Remove The Hassle Service	• Taking The Complexity And Hassle Out Of Administering Your Financial Life • Helping You Make Sense Of The Endless Financial Paperwork
The Second Opinion Service	• Making Ourselves Available To Consider New Ideas From Whatever Source They May Originate
The Inheritance Tax & Estate Planning Service	
The Taxation Planning Service	• Core Taxation Planning Advice And Also Working In Conjunction With Your Accountant And Other Taxation Advisers
The Professionals Service:	• Providing Strategic Updates To Your Accountant & Any Other Professional Advisers • Supplying End Of Year Taxation Information (as required) • Recommending Suitable Professionals As Other Needs Arise • Ensuring that everyone on your financial team provides advice in a co-ordinated and professional way.

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Lifetime Financial Planning Service – Review Meeting

The regular review meetings provided with Our Lifetime Financial Planning Service are very comprehensive and cover all aspects of your financial well being. By engaging Provident Solutions you assure yourself of regular financial checkups and access to new ideas on a regular basis.

Our 12 Point Financial Health Check

Your Issues	An Update By You On Issues Requiring Attention Or Changes To Your Circumstances
Strategic Review	An Update By Your Adviser On Recommended Changes To Your Financial Strategy
Investment Review	Looking Back On The Last 12 Months Performance
Investment Action Plan	Looking Forward And Implementing Any Changes To Investment Strategies
Debt Review	Reviewing Your Interest Rates And Debt Structuring Arrangements
Taxation Update	Reviewing Opportunities And Threats Caused By Changes To Taxation Legislation
Pensions Update	Reviewing Opportunities And Threats Caused By Changes To Pension Legislation
Insurance Review	Providing A Check Of Current Levels Of Cover And The Appropriateness Of The Plans You Hold
Estate Planning Review	Ensuring Your Estate Planning Wishes Are Current And Legally Valid
Removing The Hassle	Sorting Through Any Paperwork That You Have Received That Is Confusing Or Complicated
Family Review	Discussing Any Financial Issues Effecting Your Family
Professional Update	Providing Professional Updates To Your Accountant And Other Professional Advisers