Lyndhurst Wealth Management

Do you want to plan for your family's future – or fund your ideal retirement lifestyle?

Do you have substantial existing assets, or are you just starting from scratch?

Achieving your goals

Whatever our current circumstances are, or whichever life stage each of us has reached, we all have goals and aspirations for our own and our family's future lifestyle. But how do we make these a reality?

Like so many things in life, the answer is proper planning – which is where Lyndhurst Wealth Management comes into the picture.

Our philosophy

We believe that each of us should have a financial plan for our future that will help us achieve our desired lifestyle. This is the cornerstone of the service we offer and is designed to give you peace of mind.

We take a holistic approach to your financial well-being to help you with the big picture. We offer advice and services that will both meet your needs and realise the financial vision you have for yourself and your family.

Our commitment to you

Your Lyndhurst consultant will work with you to devise a financial plan to meet the specific needs you have in trying to reach your goals. He or she will explain the advice we give and the fees we charge in a clear, jargon-free manner.

Our service

Most financial objectives are achieved at the end of a long-term investment journey. With this in mind, our planning process is geared to developing an enduring relationship with you, which we believe you will value, and which is based on trust and mutual understanding.

As with any other journey, this relationship starts with a single step, which in our case involves gaining an in-depth understanding of your current circumstances and what you wish to achieve in the future. We then undertake an assessment to quantify your personal attitude to investment risk.

Your attitude to risk is the key driver of your investment strategy. Once your risk profile has been agreed, we use it in conjunction with our sophisticated modelling techniques, to set up a long-term investment plan aimed at providing an optimised asset allocation for your portfolio.

With a wealth of investment knowledge and expertise at our disposal, we will then offer advice on individual investments and the most tax-efficient options for them. The intention is to create a robust and flexible portfolio, designed specifically to meet your own timescales and objectives.

Setting up an account

As soon as the design of your financial plan has been completed, your wealth management account will be activated. This is achieved with minimal paperwork both at outset and at the point of future transactions, thereby dramatically reducing the amount of documentation you are required to deal with. You will be able to access your portfolio online, whenever you wish, wherever you are, and view all your investments as one unified picture with up-to-date prices.

Account reviews

An integral part of our service is regular account reviews. These give us the opportunity to rebalance your holdings and help you with any alterations you wish to make in line with the ongoing advice you receive from us.

By approaching account management in this way, we are able to keep your financial plan on track and help ensure that you achieve your financial goals.

We intend to be with you every step of the way.

To arrange a 'no commitment' consultation at our expense call us on 0800 435 638

Summary of Lyndhurst Wealth Management benefits:

- Dedicated consultant for long-term working relationship
- Quantitative risk assessment
- Sophisticated modelling technique that ensures optimised asset allocation
- Extensive range of diversified fund solutions
- Choice of tax-efficient packages
- Model portfolios available
- On-line portfolio valuations 24 hours a day
- Minimal paperwork for future transactions or alterations
- Free regular portfolio rebalancing
- Free fund switching
- Transparent low-cost/discounted charges

Lyndhurst Financial Management Limited
Lyndhurst House
High Street
Harpenden
AL5 2RT