FUTURITY

Private Client Process

Looking after the future well being of your business through strategy management

About Futurity Financial Services Ltd

Futurity Financial Services Ltd Background

- Joined Canada Life – 1996
- Joined Futurity plc – 2002
- Launched Futurity LLP - 2007
- 15 years in profession
- Year on Year Growth

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Our Objective

Develop Long Term Relationships

Providing a strategy that supports and enhances the objectives of the Client

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Our Mission Statement

A visionary company offering strategic wealth management and wealth creation services to private clients and companies.

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Corporate Client Process

The Concept

- Discussing and agreeing a strategy
- Expense of product is not the issue but the damage financially in not being looked after by a professional team
- Whatever the scenario, find out who the relevant professional is and bring them together for your benefit
- One ’phone call and it’s our responsibility

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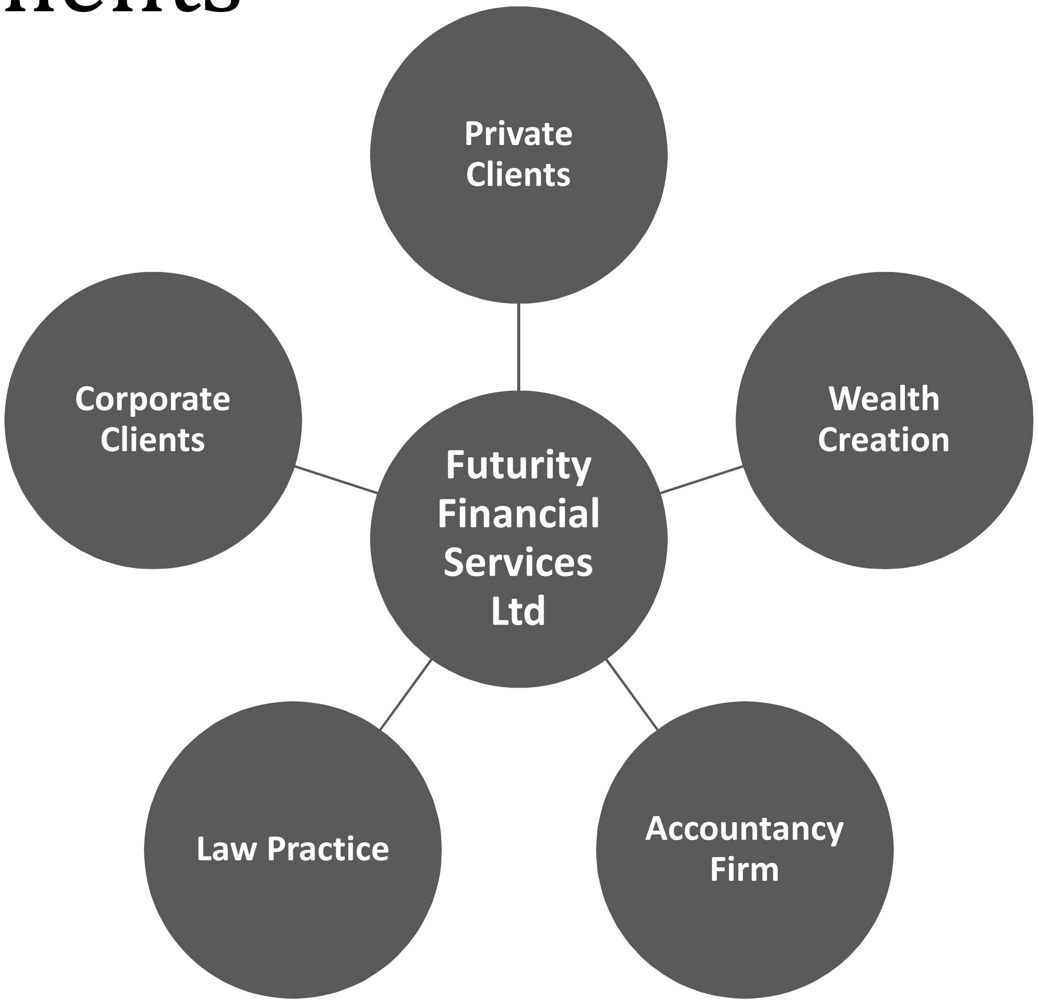
Corporate Clients



- **Business Partner**
- **Executive Assistants**
- **Salaried Team**

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Our Services

Wealth Creation

Wealth Management

Off-shore/On-shore Advice

Corporate Management

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Client Commitment

Strategy Session

Terms of agreement

Corporate Audit & Analysis

Professional Review

Document Signing

Cross Option Agreement

Trust Agreement

Periodic Review (6-12 Months)

As per agreement

Through regular review our team are able to provide a professional service before and as circumstances change

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Corporate Client Agreement

- Commission
- Fees
- Retainer

The client decides their preferred option(s) agreed in advance.

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Corporate Client Review

- Current and Future Strategy
- Liquid Assets
- Employee Benefit Audit
- Internal Marketing
- Existing Support to HR

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Corporate Client Review, Audit & Analysis

- Protection
- Critical Illness
- Permanent Health Insurance
- Medical
- Pension Schemes - Staff
- Employee benefits

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Executive Review, Audit & Analysis

- Directors/Partners
- Current Strategy
- Shareholder and Keyman
- Executive Benefits
- Future Strategy
- Exit Planning

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Corporate Event

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Futurity Financial Services Ltd is authorised and regulated by the Financial Conduct Authority

Registered No. 577323