

F U T U R I T Y

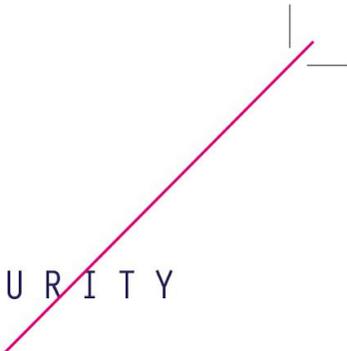
# Private Client Process

*Looking after your future well being through strategy management*

# About Futurity Financial Services Ltd

# Futurity Financial Services Ltd Background

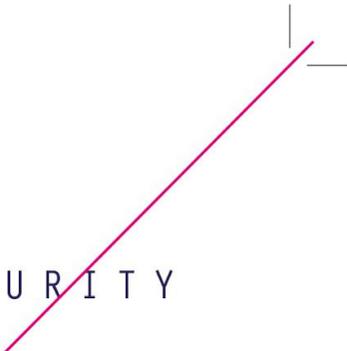
- Joined Canada Life – 1996
- Joined Futurity plc – 2002
- Launched Futurity LLP - 2007
- 15 years in profession
- Year on Year Growth

The logo for Futurity consists of a thin red diagonal line that starts from the bottom left and extends towards the top right. The word "FUTURITY" is written in a black, spaced-out, sans-serif font, positioned horizontally across the middle of the red line.

FUTURITY

# Our Objective

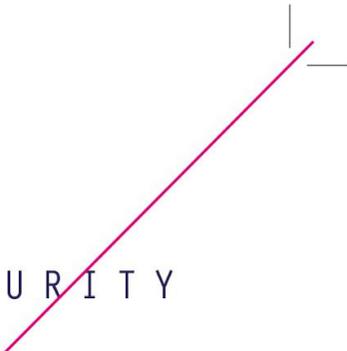
Develop Long Term Relationships  
“Generation to Generation”



FUTURITY

# Our Mission Statement

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

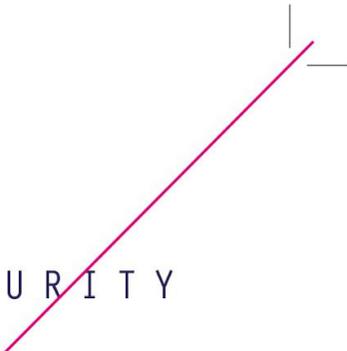


F U T U R I T Y

# Private Client Process

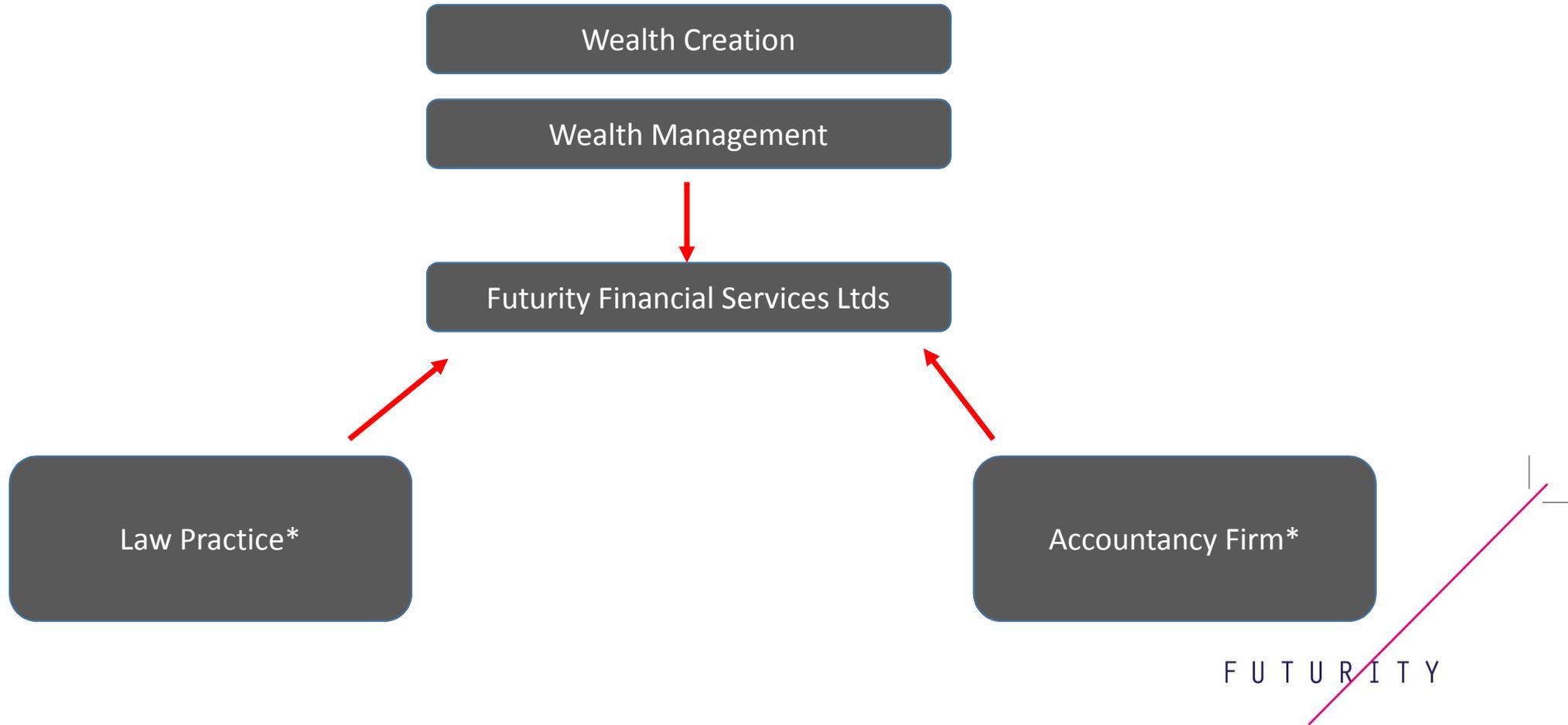
# The Concept

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



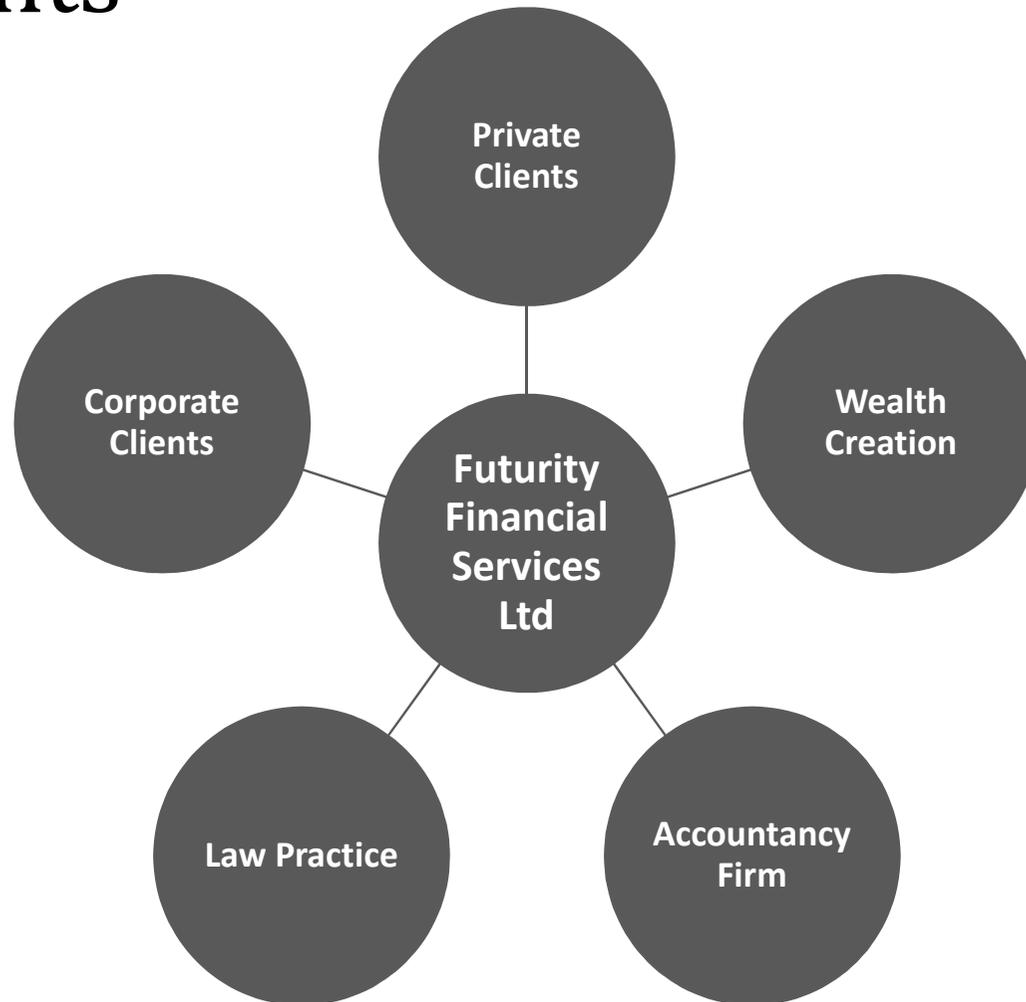
F U T U R I T Y

# Private Clients



\*Please note these are not regulated by the Financial Conduct Authority (FCA)

# Private Clients



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



# Our Services

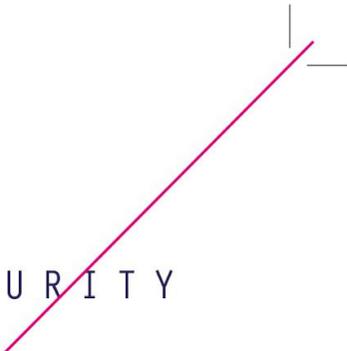
Wealth Creation

Wealth Management

Off-shore/On-shore  
Advice

Corporate  
Management

FUTURITY



# Client Commitment



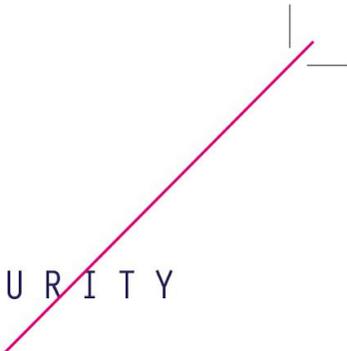
Through regular review our team are able to provide a professional service before and as circumstances change

F U T U R I T Y

# Client Agreement

- Commission
- Fees
- Retainer

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



FUTURITY

# Survivorship

Surviving Client

Professional Practice

Executive Assistant

Surviving Client meeting



**1**  
*Calls after Death*



**2**  
*Notifies Professional Practice of Death*



*Retrieves most recent financial information from last Periodic Review*



**3**

**4**  
*Assists Business Partner to build Survivorship File*



*At first meeting*

- *Discuss Assets and Liabilities*
- *Determine New Strategy & Report*
- *Make Recommendations*

**6**

*Gathers information from Financial Institutions*



FUTURITY



F U T U R I T Y

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

Registered No. 577323