

Your wealth matters

Taking care of finances at The Bar

Unique financial arrangements

Every individual's financial requirements differ - we know that. We also understand the unique challenges Barristers face and appreciate the very distinct needs, earning patterns, lifestyle expectations and compliance obligations associated with the profession.

Your financial goals may involve achieving financial independence, passing on your wealth in a tax efficient manner, investing for a future event or simply achieving clarity and peace of mind. Our wealth management service provides you with a seamless combination of financial planning and investment management, to help you achieve these goals.

Looking after your wealth

Saunderson House is a leading firm of independent wealth managers providing award-winning financial planning and investment services to high net-worth professionals, particularly at the Bar and in the legal sector. After extensive work with such individuals, we have a detailed knowledge of the associated financial nuances and how we can help busy individuals to manage them.

Financial wellbeing

As part of our commitment to the Bar, we offer complimentary in-chambers presentations around the financial areas we help Barristers with.

Key topics we have previously covered:

- Pension planning and protection
- Alternative savings after using pension and ISA allowances
- Family protection
- How to minimise tax before and into retirement
- Inheritance tax planning

In addition, presentations provide insight into:

- Fundamentals of financial planning
- Financial independence - assessing how much is enough
- Tips and hints to assist personal cash flow planning
- Tax efficient drawdown strategies
- Questions to ask any financial adviser before appointing them

We can customise presentation content to make sure we deliver the most valuable topics to your chambers. Sessions typically last around an hour including questions.

Our financial advisers can remain at your set after the presentation, to allow you to ask questions or discuss your specific circumstances.

Barrister Testimonials

"I have great confidence in Saunderson House. They are pleasant to deal with, respond quickly to my queries and take care of my finances - leaving me free to focus on the demands of my work".

Senior Barrister

"As a self-confessed sceptic of financial advisors, I admit to having been impressed with the efficient, professional and pro-active service provided by Saunderson House. They offer a balanced mixture of general information and tailored advice. I am happy to recommend them".

Commercial QC

"I have no hesitation in recommending Saunderson House. They have provided me with an excellent service for almost 10 years. They are informed, efficient and personable and their advice is clear and tailored to my personal circumstances. They are professional and pleasant to deal with, responding promptly to any requests for advice. I have found them to be far superior to any previous financial advisers that I have used".

Common Law QC

Chambers References

For feedback on some of our previous presentations, you are welcome to get in touch with the below contacts:

- [David Goddard](#), Senior Clerk - 4 Stone Buildings
- [Carolyn McCombe](#), Chief Executive - 4 Pump Court
- [Catherine Calder](#), Director of Client Care - Serjeant's Inn
- [Amanda Illing](#), Chief Executive - Hardwicke

Contact

To arrange a complimentary chambers presentation, or to find out more about how we can help you manage your finances, please do not hesitate to contact me.

Gareth Parsons, Director

T: 020 7315 6521

E: gareth.parsons@saundersonhouse.co.uk



This note is for general guidance only and should not be construed as financial advice. We cannot assume legal liability for any errors or omissions and detailed advice should be taken before entering any transaction. The value of investments and any income therefrom can go down as well as up and you may not get back the full amount you invested. Performance data is purely indicative and based on unaudited pro-forma models. Actual returns will depend on individual circumstances. Past performance is not a guide to future performance. Saunderson House Limited is authorised and regulated by the Financial Conduct Authority.

Saunderson House Limited
1 Long Lane, London EC1A 9HF

T: 020 7315 6500

F: 020 7315 6650

E: shl@saundersonhouse.co.uk

www.saundersonhouse.co.uk



Registered in England. Address as above. Number 940473
Authorised and Regulated by the Financial Conduct Authority.

V1110517LH