



Supporting our Insurance Brokers

We understand that clients need more than one type of professional service. We can't do everything and it crucial that clients are able to access a full range of services offered by trusted local professionals that we can work effectively and efficiently alongside. We have a keen focus on developing close relationships with fellow professionals so that together, we can provide clients with a fully integrated service that ensures they receive exactly what they need.

Similarly, as an Insurance Broker there are times where you will need to call in other professionals. We work hand in hand with Insurance Brokers to ensure that clients receive a full and joined up service. We understand that you need to be able to rely on a trusted partner to deliver a service you are happy to recommend and work alongside. We will endeavour to meet the high standards you set for work with your clients and make sure we work together effectively on ensuring any solution is the most suitable one.



To give you some idea of where we might be able to assist you with your clients, we have listed some areas of need, where there may be financial solutions available to your clients.

- Business Succession Planning
- Self Administered Pension Plans
- Self Invested Pensions
- Company Investments
- Company Pension Contributions
- Life Cover/ Income Protection
- Death In Service
- Cashflow Analysis and planning to help ensure financial future
- Partnership/Shareholder Protection
- Keyperson Cover
- Inheritance Tax Planning
- Relevant Life Cover
- Selling your business
- Buying a business - finance

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