



# BREWIN DOLPHIN



SHREWSBURY



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## AT BREWIN DOLPHIN

**We believe that the investment advice you receive should be as individual as your financial needs. We have worked this way for generations, providing tailored solutions that help our clients to create and preserve wealth.**

Today, we are putting that accumulated experience to work for many thousands of clients, including private individuals, charities, trusts and pension funds. We look after £25bn in investments from 40 offices throughout the UK and Channel Islands.

## IN SHREWSBURY

Our team of experienced investment professionals have worked together for many years and have recently joined Brewin Dolphin. They have built a strong reputation for providing clients with professional financial advice in and around Shropshire, the Welsh borders and further afield.

Our investment managers are all Members or Fellows of the Chartered Institute for Securities & Investment and, with the extensive infrastructure and resources at their disposal, are well positioned to advise clients on a vast array of investment options.

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## THE WAY WE WORK

### **Means we treat our clients as individuals.**

At Brewin Dolphin, every investment relationship begins with you, your investment manager and a blank sheet of paper. Before we offer any advice, we start by gaining a true understanding of your circumstances and your needs. That means we always invest time in learning about your financial situation and ambitions for the future.

## INDEPENDENTLY OWNED

Originally established in 1762, we are now one of the UK's largest independent private client investment managers. We're independent and have the freedom to search the whole of the investment marketplace for our clients. So instead of leading you towards in-house funds, we'll be focussed on selecting investments that are exactly right for you. It all adds up to fair and impartial advice when you are making the decisions that will shape your financial future.







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# MORE THAN THE SUM OF OUR PARTS

In an increasingly complex market place, sound and timely investment management is the key to protecting the long term financial wellbeing of your family or your business. At Brewin Dolphin, our team of investment managers have the knowledge to deliver clear, expert guidance. As one of the UK's largest independent private client investment managers, Brewin Dolphin is well placed to provide unbiased investment advice that is structured around your needs.

Our independence comes from not being owned or controlled by any other company. Our status in relation to advising on packaged products is 'whole of market'.

## **Investment Management**

We can help you to structure an investment portfolio that best suits your needs, whether it is to pay school fees or to achieve long-term returns. Depending on the level of day-to-day involvement you would like to have in investment decision-making, you can choose from our discretionary and advisory services. In both cases, your investments can be checked online at any time.

## **Discretionary Management**

Our discretionary management service allows you to hand over day-to-day investment decision-making on your portfolio to our experienced investment managers, ensuring they can act swiftly when markets change.

## **Advisory Management**

By choosing the advisory management service you retain greater involvement in the way your portfolio is run.

### **Financial Planning**

We believe that investment management is most effective when it is part of a broader financial strategy and that is why our financial planning teams are fully integrated with our investment management teams. Our areas of expertise cover:

### **Tax Planning**

Acknowledging that your tax position is key when planning investment advice, we can help with this vital component of wealth management and are highly capable when discussing in detail tax effective structures such as ISAs, SIPP's, and onshore and offshore bonds.

### **Business Planning**

For directors and owners, we can collaborate on specialist issues such as key management cover, executive pension plans, employee benefit schemes and corporate and partnership protection.

### **Pensions**

With the wide range of options available in the pensions market today, our financial planners can work with you to help take care of all your planning pre and post retirement.

### **Savings and Investments**

Taking into account your preferred timescale and levels of return, we can explore the products that are the most suitable for you, from competitive deposit accounts, to investment bonds, to structured investment portfolios.

### **Protecting your family and business**

The long-term future of your family or business is paramount, and we can help you navigate through suitable options whatever you are considering – including life assurance, critical illness cover or health insurance.

No service is suitable in all cases. If you are unsure, please contact us for advice.



## GETTING IN TOUCH

If you would like to know more about Brewin Dolphin in Shrewsbury and what our team can do for you, please do not hesitate to contact us using the following details. We will be delighted to arrange a free consultation at your convenience.

Brewin Dolphin  
Mutual House, Sitka Drive  
Shrewsbury Business Park  
Shrewsbury SY2 6LG

### **UK**

**T** 01743 399000

**F** 01743 399001

### **INTERNATIONAL**

**T** +44 (0)174 339 9000

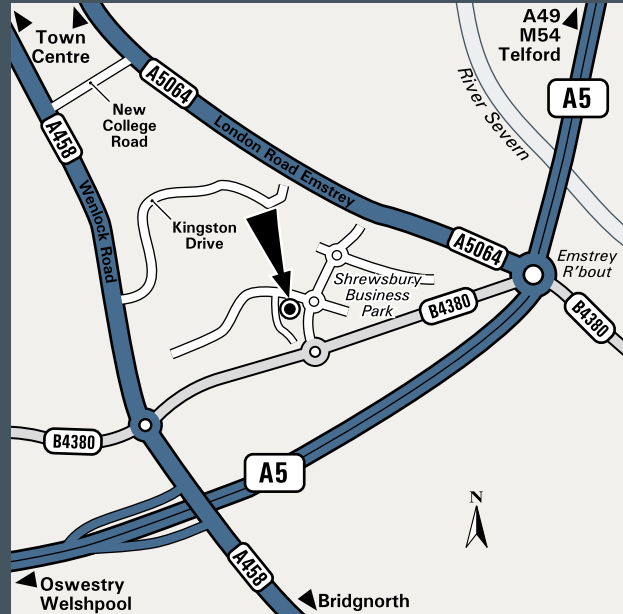
**F** +44 (0)174 339 9001

**W** [brewin.co.uk](http://brewin.co.uk)



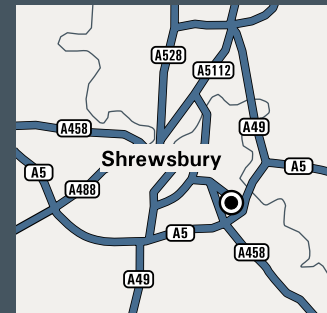
Aberdeen	Leicester
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Birmingham	London
Bradford	Lymington
Brighton	Manchester
Cardiff	Marlborough
Cheltenham	Newcastle
Chester	Norwich
Dorchester	Nottingham
Dumfries	Oxford
Dundee	Penrith
Edinburgh	Plymouth
Elgin	Reigate
Exeter	Shrewsbury
Glasgow	Stoke-on-Trent
Guernsey	Swansea
Hereford	Taunton
Inverness	Teesside
Jersey	Truro
Leeds	York

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**W** [brewin.co.uk](http://brewin.co.uk)



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**Driving Directions:** Continue on the A5 until the Emstrey roundabout junction with the A5064/B4380. At the roundabout join the B4380, following signs for Bridgnorth and B4380 (A458). At the roundabout, take the second exit (signed Shrewsbury Business Park). Enter the Business Park and at the mini-roundabout, take the first exit. Turn left and our office is located on the left hand side.

**Car Parking:** Car Parking is available on site.