



Wealth Management

We still meet clients who do not know that Hillier Hopkins offers a full wealth management service! Hillier Hopkins wealth management team are ideally positioned to offer advice to wealthy private clients and trustees. Within one organisation we have experts with specialised qualifications and experience in investments, trust matters, all taxation matters, and probate.

Hillier Hopkins is genuinely independent. We are owned by our members and only by our members. We are able to research and select experts and solutions from the entire investment and taxation universe.

Fees are agreed in advance and are rarely simply based on hourly rates. Most clients agree a structure that includes unlimited basic telephone and e-mail support. Moving away from hourly rates has encouraged communication between clients and Hillier Hopkins.



Hillier Hopkins Wealth Management Department is concerned with assisting clients in being confident that they will have the financing available to meet all their goals regardless, as far as possible, of financial conditions and catastrophes.

Most of our clients are at a stage in their life where they have accumulated a substantial level of capital, often including pension arrangements. They are more concerned with protecting this hard earned capital from poor investment advice or poor taxation advice than with *promises of some seemingly arbitrarily established rate of growth*.

Money means many different things to different people. Some clients are seeking financial freedom or independence to allow them to live without having to work. Many clients have achieved tremendous success in their career and want to leave a legacy either for their heirs or to establish a charity. Whatever our clients' requirements are we provide them with disciplined and entirely independent advice. We seek out investment managers from across the world and advise on tax structures to maximise net returns.

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In most cases we can achieve far better terms than the standard retail terms offered by most UK investment houses. We have also arranged access to some funds that are normally only available to institutions.

The three key areas where we add most value are:

- 1) Asset allocation
- 2) Taxation advice
- 3) Expense reduction

But many of our clients tell us that what they value most is the reassurance that we provide and the removal of so much paperwork.

Wealth management is led by Ben Sherwood and David Nye. Both have many years experience of dealing with private clients. They both assist investors in making intelligent investment decisions.



Ben Sherwood – Partner

Ben has worked in financial services for 20 years. He holds the AIFP, AFPC (including the specialist pensions paper G60) as well as the portfolio management qualification IMC. He specialises in advising professional trustees and wealthy retired individuals. Key areas of expertise are holistic financial planning, inheritance tax mitigation and portfolio design and management. Ben is also an Associate of the Divorce Corporation.



David Nye - Partner

David specialises in acting for partnerships, solicitors, high net worth individuals and trusts and advising them on all related taxation and estate planning matters. He is a Chartered Accountant, a member of the Chartered Institute of Taxation and of the Society of Trust and Estate Practitioners.

If you would like a fresh perspective on your financial position from genuinely independent professionals please contact Ben Sherwood on 01442 220713 or ben.sherwood@hhllp.co.uk

For more information on any of the issues raised your current Hillier Hopkins contact will be happy to assist you. Alternatively, please call us on 01442 220788 to speak to one of our advisers.

Hillier Hopkins LLP are registered to carry on audit work by the Institute of Chartered Accountants in England & Wales and authorised and regulated by the Financial Services Authority.

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