



**Murray Smith**  
FINANCIAL SERVICES

# Wealth Management

It's our job to help you grow and protect your wealth



**Murray Smith's Wealth Management team helps many of the region's wealthy individuals invest their hard-earned money.**

### **People you can trust**

Murray Smith is a long established firm of Chartered Accountants. The Wealth Management team was set up to help our business clients invest the proceeds of their hard work. We can help place your money in a secure environment with respectable returns.

### **Full market access**

Our advisors are not tied to any particular investment providers. This means we can research the entire market to find the investment products that best fit your requirements.

### **Building long-term relationships**

We work hard to build long term relationships so that you can be comfortable with the people you deal with and trust the advice you are given.





Wealth Succession



Philanthropy



Family Business



Wealth Protection

## Regular monitoring and updates

Once your money has been invested we will monitor its performance relative to the market and other investments in our client portfolios. Your advisor will meet with you periodically to go through the investment performance in detail and discuss the implications of any changes in your own circumstances.

## Saving tax

The Wealth Management team work together with the tax and accounting experts at Murray Smith Chartered Accountants to make sure that we save you tax wherever possible. This can involve reducing Income and Capital Gains taxes or extend to a full review of your Inheritance Tax position and recommendations for reducing the tax on your estate.

If you would like to speak to an advisor for a no-obligation discussion about your investment options please get in touch using the contact details overleaf.



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