

This Is Your Life What's Your Plan Now?

Successful business owners,
you've worked hard, you've built it,
now lets make the most of it.

Walmsley
FINANCIAL PLANNING

A photograph of a man and a woman sitting in the back of a car, looking out at a sunset over a mountain range. A golden retriever is sitting between them, looking out the window. The scene is warm and peaceful, with the sun low on the horizon and mountains in the background.

Your Financial Future Safeguarded for the Road Ahead...

Can we control life? Probably not, but we can put things in place financially to be clear, confident and mitigate life's milestones and stresses before they become problems.

Need a down to earth, straight talking, financially savvy best mate alongside you, to safeguard your financial future? Where can you go these days for honest to goodness personal and business financial advice? Somewhere you can build a trusted long-term relationship?

Do you want to go to a stuffy office and see a pinstriped suit where profit comes before people? I'd rather get to know you on the golf course, a dog walk or halfway up a hill.

It's all about you, your future, your freedom and I know for you it's all about trust.

Hi, I'm Pete Walmsley and like you I've got to a stage in life where I know what life's about and what's important.

I appreciate it's about making money, saving money and protecting the things you love and value. I'm a family man, married and father to 3 chatty children and an energetic Vizsla who the whole family know is the number 1.

I love my job, friends are clients and client's become friends, so work isn't hard, but life is for living. I don't work Mondays and finish early on Fridays, giving me plenty of family and friend time. Did I mention I love being outdoors?

Everyone needs peace of mind, some certainty in an uncertain world, one less worry then you can focus on the exciting next stage. The dull stuff you may need to know, I have been in financial planning for over 10 years.

Our Practice is over 10 years old, and is founded on values of approachability, accessibility, and straight-talking. The business focuses on responsibility demonstrated by our accreditation to the Good Business Charter

My team are equally long standing and as committed and experienced as I am, we all go the extra mile and are at the end of the phone when you need us.



"Peter and the team are always friendly and on hand for any assistance. We have been with Peter for the past 4 years now, and choosing where to invest our money in ways that align with our values has been really helpful. No question goes unanswered and is explained in a detailed easy to understand way. Planning for the future was made so much easier with Peter's help. We cannot recommend him enough to people. Keep up the good work team."

Mark Bonsor, Director, Batoko Ltd.

Life can be eventful
and unpredictable,
let's futureproof it
together.

Walmsley
FINANCIAL PLANNING

Brunel House, First Floor,
9 Penrod Way, Heysham,
Morecombe, LA3 2UZ

 walmsleyfinancialplanning
 Walmsley Financial Planning

www.walmsleyfinancialplanning.co.uk

Walmsley Financial Planning Ltd is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the group's wealth management products and services, more details of which are set out on the group's website www.sjp.co.uk/products. The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives.

Associate Partner Practice

**St
James's
Place**

SJP Approved 26/08/2026

