

# YOUR PATH TO FINANCIAL CONFIDENCE

In partnership with us

We'll review the advice we give you every time there's a change in your circumstances or your goals, and update it if necessary

From helping with later life planning arrangements to keeping you safe from scams, we can offer so much more than financial advice

## FIRST MEETING

Getting to know you. We focus on understanding your unique circumstances and goals to build and maintain your wealth

## FINANCIAL RECOMMENDATIONS

The advice we'll give you, based on your circumstances and your goals

## ACTIVATION

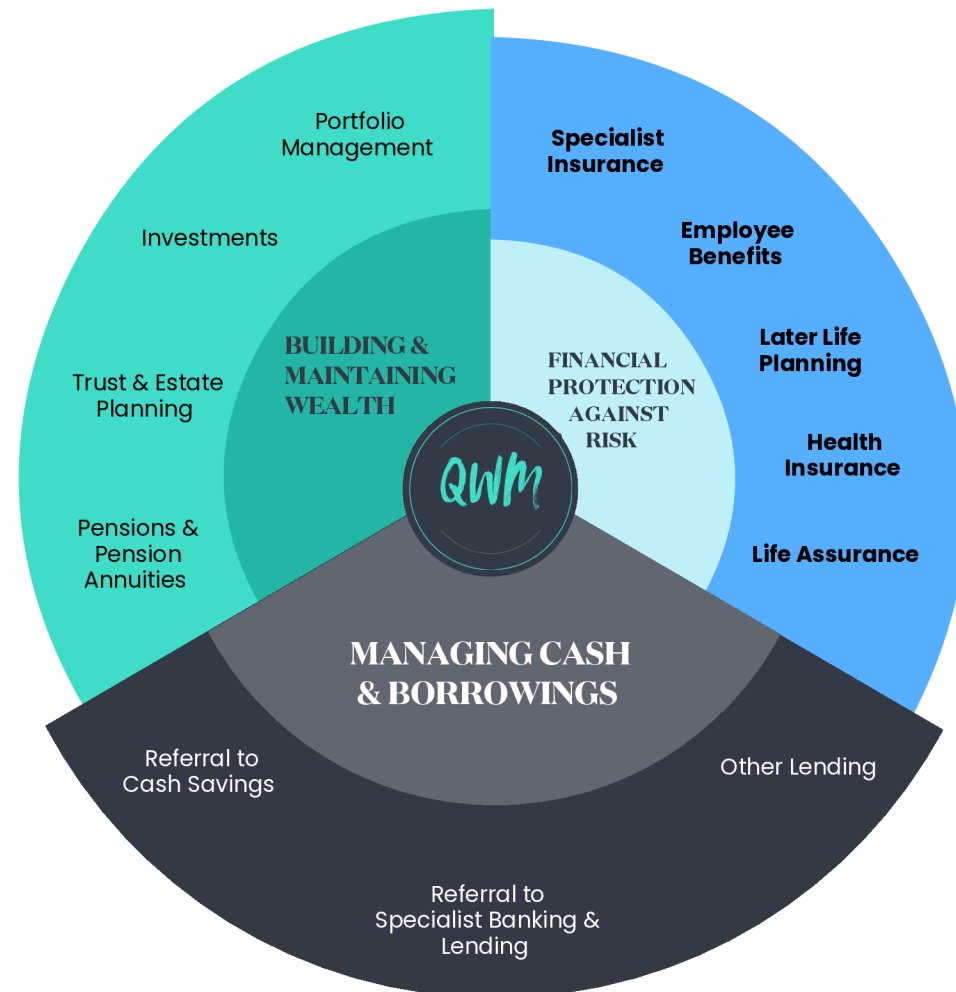
Implementing our advice and putting it into action

## REGULAR REVIEWS

We will continue to build our relationship to better understand any changes in your circumstances & goals, ensuring that our advice remains aligned & meets your expectations.

## WE GO ABOVE & BEYOND

We can help with a range of life events that go beyond purely financial matters



The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.

Where we refer you to a service, these will be separate and distinct to those offered by St. James's Place.

Quintessential Wealth  
Management Ltd

Heading  
towards  
your goals

Partner Practice

St  
James's  
Place

## A WIDE RANGE OF PRODUCTS AND SERVICES

We can help with almost every aspect of financial planning, from investment, pensions and trusts, through to insurance and later life planning.

And remember, the more we know about you, your circumstances and goals, the more we'll be able to advise on the best way to structure your finances to help you achieve genuine financial wellbeing

Quintessential Wealth Management 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](http://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.

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01524 958535

[www.quintessentialwm.co.uk](http://www.quintessentialwm.co.uk)