Dyer&Co.

WEALTH MANAGEMENT LTD

Welcome to Dyer & Co. Wealth Management

At Dyer & Co. Wealth Management Ltd we provide friendly, approachable, and professional financial advice, tailored to individuals, families and businesses. Our aim is to guide you through your financial journey with care and expertise.

Our Approach: Working together

We pride ourselves on being a friendly, family business, working with you to help you reach your financial goals.

Experienced Team
Our dedicated and professional team cover a diverse range of specialisms, but we're all committed to the same goal of helping you achieve the best results possible.

No-obligation consultation
We offer a no-obligation initial consultation to establish whether we can help you.

Regular reviews
We review your plan regularly to ensure we address any changing circumstances to keep your goals on track.

Personalised plans
We take the time to understand you, your financial needs and goals, creating the right plans to help you meet them.

Keeping you informed

Whether you are an experienced, confident investor, completely new to face-to-face financial advice or somewhere in between, we provide clear communication and ongoing support to suit you, including:

- Regular monitoring and annual reviews
- Adjustments to your plan based on changes in legislation or your personal circumstances to help keep your plans on track.
- Comprehensive explanations to help to help you understand all your plans in your financial portfolio.

Services we specialise in

We provide relationship-based advice specialising in:

- Retirement Planning - Pre and post retirement planning strategies
- Wealth accumulation and risk protection - how to build and safeguard your assets
- Protection - solutions to protect you, your family, and your business
- Profit extraction for business owners
- Tax and Estate Planning to ensure a smooth legacy transfer
- Mortgage and access to specialist lending - tailored lending solutions
- Business sale support - Expert advice for aspects of exit strategy planning and sale transition.

Your home may be repossessed if you do not keep up repayments on your mortgage.

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.

Communication & Accessibility

We will discuss with you how you would like to be kept informed to ensure you are fully up-to-date about subjects that are important to you. We're also on hand in the following ways:

- Office hours - You can also contact us to speak to a team member from 8.30am -5pm Monday to Friday, or we'll aim to respond to emails within 24 hours.
- Flexible meetings - We can provide in-person or virtual meetings with our advisers, with the option to meet out of hours if needed.
- 24/7 Online Access - Access to your online wealth account whenever you need it.
- Remote Secure online services - you can choose between using Secure remote services to save you time or opt for face-to-face discussions to suit your needs.

Our values

We are a friendly, family business, who are passionate about wanting to create longstanding relationships. We help our clients navigate their financial journey and support them in planning for their financial freedom, both for themselves and their future generations.

Serving our clients - We put our clients at the heart of everything we do. We are proud that our clients trust us to look after their finances and that is why our client experience always comes first.

Doing the right thing – Honesty and integrity is key to everything we do. Helping our clients to realise their goals is not always simple and sometimes the right plan is not always the obvious one.

We help families transform their financial goals into reality in an easy, friendly, and approachable way.

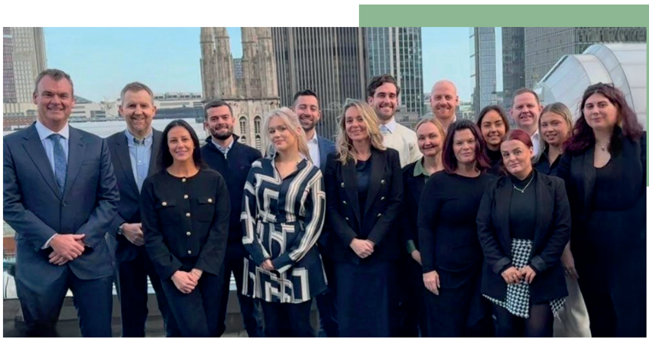
We are also there for you in challenging times, such as bereavement and have specialist advisers on hand at the end of the phone to provide you with compassionate support during stressful times.

Thinking long-term – We are passionate about providing a genuine and excellent service as we support you on your life's journey. We will be there every step of the way, adjusting your plan when needed, but always working towards your long-term goals.

Serving the community

At Dyer & Co. we believe in giving back through St. James's Place Charitable Foundation, participating in events such as sponsored walks, golf days, triathlon, relay marathons, as well as working with local charities.

We are always keen to hear suggestions from clients about other charities that are close to their hearts who might benefit from our support.



At Dyer & Co, we are committed to your financial success every step of the way.

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