Kellands Bristol ~ Working with Professionals

At Kellands Bristol, we have always worked closely with fellow professionals, such as solicitors and accountants, to help provide their clients with financial planning solutions.

Professionals choose to work with us for many reasons.

Our pedigree and track record:

- We are a Chartered financial planning practice
- We have well over 30 years' experience
- During which time we have established excellent professional relationships
- We work locally but have national coverage and acclaim
- We offer an unrivalled holistic financial planning service

Type of clients we specialise in:

- Company executives
- High net worth individuals
- Owners and directors of SMEs
- Those approaching retirement
- The retired

Business areas that we specialise in:

- Wealth management
- Investment planning and advice
- Pre-retirement planning, Retirement planning, Pensions and Divorce
- Tax planning including Inheritance Tax planning
- Cashflow forecasting
- Life assurance and protection

Our access to discounted portfolios and funds:

Through our excellent working relationships, we have access to discounted portfolios and funds.

These include;

- BMO
- Brewin Dolphin
- Schroders
- Rathbones Greenbank

From a client's perspective, with a fellow professional firm and their IFA working in tandem, they can appreciate the added value that the provision of an all-embracing professional service provides.

To find out how we can help you and your clients, please contact us on 0117 900 4000 or visit www.kelland-bristol.com

KELLANDS
CHARTERED FINANCIAL PLANNERS

Providing specialist financial advice