

NLPFM news

News and views from NLP Financial Management

Investing for kids

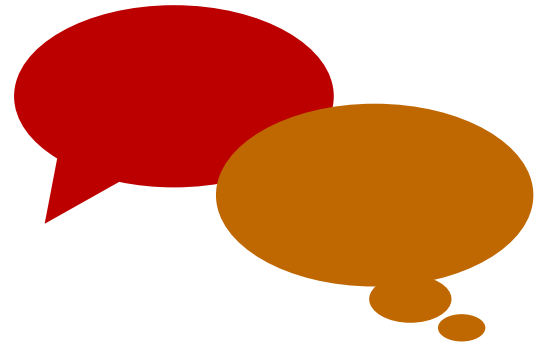


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The role of a financial adviser



“the emphasis has clearly moved from being a product salesman to being a trusted professional adviser to one’s clients in a similar way to their accountant or solicitor.”

Elliot Gothold
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Adam Katten
T
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Using pensions to protect assets

Pension planning – act now

However there are also several steps that could be beneficial if implemented prior to 5 April.

Case Study

- 1.
- 2.
- 3.

We believe that the significant flexibilities provided by the new regime will act as a welcome catalyst to invigorate saving for retirement and pensions could prove a valuable tool to provide for future income.

Andy Butcher
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Graham Mendoza-Wolfson
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Why we approve and reject funds

Tax year end opportunities

“We believe that our in-depth qualitative due diligence enables us to avoid potential “problem funds” whilst also unearthing some hidden gems which might not be readily obvious simply from the past performance figures”

Lee Pittal
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Ed Froggatt
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