

Introducing



SEYMOUR FINANCIAL

Your Personal Life Planners

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Our STORY



Founded in 2019, Seymour Financial is an independent wealth and advisory firm which offers clear tailored solutions to clients in a relaxed and professional manner. Seymour was set up with the focus on one main outcome for clients; peace of mind.



Understanding what a client needs or wants, both now and in the future is at the core of our business; and being independent allows us to consider all strategies and product providers, so our solutions deliver results.

Clients are never too small or too wealthy but as a firm we specialise in the following:

- Retirement and later life planning
- Investment advice
- Protection
- Tax Efficient investments
- Wealth protection & Inheritance Tax planning
- International Pensions

Through trusted partnerships and our association with our regulatory firm Insight Financial Associates Ltd we are also able to assist clients with:

- Wills and Trusts for estate planning
- Business Management
- Property portfolio structuring
- Tax Planning
- Private Medical Insurance
- Lifetime Allowance issues
- Financial Coaching

Whilst our regulatory office is in Norwich, Seymour's main office is in the heart of England in Market Harborough, Leicestershire. However, we have clients all over the UK and internationally, and a second satellite office in Guernsey.

Creating the perfect balance between your needs today and tomorrow is key.

CUSTOMER SATISFACTION

Testimonials



The customer is at the heart of everything we do, and we have the testimonials to prove it!

Very Satisfied - Always happy to help when you need it - VS

Fliss Wallace put our minds at ease and gave clear advice - CS

Professional, Reassuring, Accurate, Responsive - CB

Fliss clearly listed to my objectives which translated well into my portfolio. -Anon.

Informative, clear and easy to follow. I have a better understanding of how best to manage my investments.- OM

Adrian is very personable and engages with the client - DK

Fliss is very knowledgeable, you can trust her advice. -Anon.

I feel my finances are in much better order and the advice given has really helped me. - LM

Fliss was patient and took her time to always make sure I understood everything. -Anon.

Adrian really excelled during the process. Nothing was too much trouble to answer - JH

Good communication, always available by phone or email to discuss any issues or questions. -SL

Structured, well presented. Exceeded my expectations -CD

Simple and straightforward and without complications. You can never be 100% perfect but in this case it was very close! - SL

I now know where I am and where I need to be in respect of my pension. - RT

Working with our clients is a privilege and a commitment we make for life.



Our SUCCESS STORIES

Consolidation & Retirement Planning

Our two married clients approached us with no less than 12 pension and investment policies with no understanding of how much they had, what was invested or what they were being charged.

Confused with constant paperwork from so many schemes, we consolidated them into a single pension plan for each of them, with a simple risk appropriate investment strategy on an investment platform they have 24 hour viewing access to. At last everything is in one place.

With our cashflow planning software, we were able to give them the good news that should they want to, they can afford to retire earlier than planned and still achieve their luxury retirement budget.



Business Clients

Two sisters that own a successful salon business needed a financial plan not only for themselves individually but also for the business. We were able to demonstrate how to reduce their corporation tax within their business by more effectively deploying a pension planning strategy and securing them the right level of life & critical illness cover that would better protect their loved ones. Having their investments automated and invested by a professional gave them the peace of mind and the time to focus on business revenue. Having already witnessed first hand the financial impact of unexpected family health issues, we were also able to secure them cost effective private medical insurance through a trusted partner, as well as setting up a will and power of attorney for each of them.

Investment Advice for Inherited Wealth

Our client in his 30's inherited a sum of money but was completely overwhelmed with what to do next and how to invest it for his future. By balancing the focus on repaying his past liabilities, his present needs and his future goals, we were able to put together an ongoing financial plan that has given him greater financial clarity and security.



Our PROCESS



1

Meeting our clients

We are happy to meet clients in any medium they feel comfortable, whether it is face to face, a simple telephone call or now the increasingly popular Zoom or Teams Call.

Our first "Discovery Call" however tends to take place online where we establish the parameters of your needs, objectives and how we can support you.



2

Fact find & risk assessment

Should we invite you to move onto the next stage, we arrange a detailed Fact Find and Risk Assessment meeting, whereby details on existing policies, assets and liabilities, State Pension projections, future plans, legacy objectives and inheritance tax are all carefully detailed, collated and considered in order of priority to you. We also discuss at length your attitude to risk, investment experience and investment horizon.

At this stage we provide you with a clear indication of cost, both initial and ongoing before you commit to the process.



3

Creating your bespoke plan

Whether it be a financial plan, retirement planning report, complex plan or straightforward investment advice, our plans are written with simplicity and plain english in mind.

Should you choose to become an ongoing client with us our annual review process updates, tweaks and amends your plan as your circumstances change, ensuring it remains on track.



Fliss Wallace MA Oxon ACSI CeFP

Independent Financial Adviser

With a background in financial services and property structuring, Fliss retrained as an IFA in 2019. Working as a paraplanner and more widely within Financial Services for nearly 10 years prior to qualifying, she has a knowledge base wider than just the traditional financial solutions. This means her skillset extends to the needs of business owners, High Net Worth Clients and Retail clients equally. Fliss is also a Certified Financial Coach which she operates through Fliss Wallace Financial Coaching. Together with Adrian, she also owns a SSAS Practitioners, SSAS Bureau, helping set up and provide administration services to Small Self Administered Schemes for Business owners.

Fliss.wallace@seymourfinancial.co.uk



Adrian Howe

Client Services

A former broker, adviser and pension trustee in Guernsey, Adrian is best placed to be first port of call for our new and prospective clients. From the very first meeting, Adrian seeks to guide you through the fact finding and then advisory process, asking thought provoking questions of you to ensure your true objectives, goals and values are met within your financial plan.

Adrian.howe@seymourfinancial.co.uk



Beverley Tompkins DipPFS

Paraplanner

Beverley is the backbone of the administration and operations side of the business. Working closely with Fliss and Adrian on new and ongoing advisory reports, Beverley also acts as a liaison with clients for their annual reviews, paperwork and arranging diary appointments with the team.

Beverley.Tompkins@seymourfinancial.co.uk

Meet OUR TEAM



Alice Ruben

Independent Financial Adviser

Alice is an Independent Financial Adviser with 10 years' experience in the Financial Services industry. She began her career in Wealth Management before moving into a Relationship Manager role, supporting families with long-term financial planning. She qualified in 2024 and specialises in ISAs, investments, pensions, and protection.

Alice.ruben@seymourfinancial.co.uk



Celia Callaghan

Client Support

Celia began her career in business support, where she developed a strong interest in finance through managing administrative and financial responsibilities. In her role at Seymour Financial, she assists with the smooth running of client reviews and new business processing, ensuring all documentation and communication are handled efficiently.

Celia.callaghan@seymourfinancial.co.uk



Sasha Cole

Marketing Assistant

The team is also assisted by Marketing Assistant Sasha Cole, who joined the team in 2024. Sasha is in charge of all social media, advertising and marketing campaigns as well as feedback and client friendly documentation.

Sasha.cole@seymourfinancial.co.uk



Insight

Fliss and the team are also supported by the administration team at Head Office in Norwich. They ensure a seamless experience for our clients and help everything run smoothly.



Let's get in touch

Seymour Financial, a trading style of Insight Financial Associates Ltd
C/O Insight House, 7a Alkmaar Way, Norwich International Business Park, Norwich, NR6
6BF

Offices in Market Harborough & Guernsey.

Head Office: Norwich.

Main Switchboard: 0208 167 9869

Email: Office@seymourfinancial.co.uk

<http://seymourfinancial.co.uk>

Instagram: [@seymourfinancial](https://www.instagram.com/seymourfinancial)

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