

Case Study

Professor R
Merseyside
June 2024



KS WEALTH
INDEPENDENT FINANCIAL ADVISORS

Background

This client, a well-respected rheumatologist, approached KS Wealth IFA seeking guidance on his NHS retirement options, taking into account all the tax implications, which then led into discussions around securing financial futures for his three children.

With a pre-existing relationship with Kris from a previous business, he trusted our expertise but needed detailed advice to navigate the complexities of financial planning.

“I was looking for a financial advisor to help with pension planning and finances for my children.

“My three children will be buying houses in a few years, so setting up savings accounts and ISAs was a really important factor for me.”

What we did

We provided personalised financial planning services. Kris set up the private pension tailored to the client's needs, addressing tax implications and optimal structuring.

We then built in succession planning and invested parts of the proceeds of his pension lump sum from the NHS into savings plans for his children, preparing them for future financial needs such as buying their first homes.

Feedback

Through this, the client felt secure and confident about his financial future. Our flexible meeting options, quick responses and thorough explanations enabled him and his wife to make informed decisions.

Client Profile

Client industry: Respected medical professional in rheumatology with a private clinic

Years as a client of KS Wealth: 7 years

Three main areas of support:

1. NHS pension options and advice
2. Private pension and protection via his limited company
3. Succession planning and investing for his children's future

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It's been great working with KS Wealth. They're very approachable, knowledgeable, and sensitive to my needs.”



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