



Could your family, friends or colleagues benefit from one of our professional financial planning meetings?

As an existing client of Accession you will no doubt have benefited from one of our financial planning review meetings. Much of our business comes from satisfied clients who recommend us to their family, friends or colleagues.

OUR SERVICES – TAILORED TO YOUR NEEDS:



Inheritance Tax Planning

Inheritance Tax Planning: We can help by:

- Helping to minimise inheritance tax and form a succession plan.
- Exploring tax-efficient strategies that protect your family's financial future.
- Understanding how the recent Budgets changes might impact your future.



Retirement Planning

Retirement Planning: Preparing for the Future: We can help you navigate:

- How much you need to save for retirement to maintain your lifestyle.
- Ways to diversify your savings outside of your primary assets.
- How to create a realistic and actionable retirement plan that works for you.



Investment Planning

Investment Planning: Growing Your Wealth. We'll help ensure your investments:

- Align with your financial goals and time horizons.
- Are structured to be as tax-efficient as possible.
- Have the right level of risk for your comfort and objectives.



Protection Planning

Protection Planning: We help you prepare for the unexpected:

- Assess whether you and your loved ones are financially protected in case of illness, disability, or death.
- Ensure your business and personal assets are shielded from unforeseen events.

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.

COULD YOUR FAMILY, FRIENDS, OR COLLEAGUES BENEFIT FROM OUR SERVICES?

If you've found value in our financial planning services, why not share the opportunity with those you care about? Many of our new clients come through referrals from existing clients like you. If you know anyone – whether they're planning for retirement, concerned about taxes, or simply looking for better investment advice – we'd love to help them too.

Simply share this leaflet with them, or encourage them to get in touch for a professional financial planning meeting.

Please scan the code if you would like to arrange an appointment.



Senior Partner Practice

St. James's Place

Chartered

Accession is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website www.sjp.co.uk/products. The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives.

Accession is a trading name of Oundle Wealth Management Ltd.

SJP Approved 17/2/2026

accessionfp.co.uk

First Floor, 4 West Street
Oundle, Peterborough, PE8 4EF