## Who should you trust with your family’s finances?

## The biggest? Or the best.

Not all wealth managers are created equal. In 2022, we were named *Best Wealth Manager* at the Shares Awards, as well as the Financial Times and Investors’ Chronicle’s *Full SIPP Provider of the Year*, *Stockbroking Customer Service of the Year* and *Tax Planning Adviser of the Year*. We are proud to be different.


To find out what sets us apart, email *info@killik.com*.

Capital at risk. Past performance is not a guide to future returns. Tax treatment depends on the individual circumstances of each client and may be subject to change in the future.

Save – Plan – Invest

KILLIK & Co

for your family

# How we work with you

**Step 1**

We start with a conversation about you, your personal and financial circumstances, and any specific questions you may have.

**Step 2**

Having understood more about you, the next step is to introduce you to the right advisers and specialists within Killik & Co to discuss how we can help.

*We do not charge anything for this and there is no obligation to go any further if you don't want to.*

**Step 3**

If you become a client, your dedicated adviser will work with you to provide specific planning and investment advice to help you achieve your goals.

**Step 4**

We stay with you every step of the way to ensure we adapt quickly to changes in your life.

**Step 5**

Through face to face meetings, detailed quarterly statements, 24 hour access to our Client Portal and invitations to our regular events, you decide how involved you want to be with your accounts and everything else that Killik & Co offers.

**Our areas of expertise**

*Investment Advice and Management | Financial Planning | Pensions ISAs | Junior ISAs and SIPPs | Wills | Trusts | Tax*

To book your free consultation please drop in to our branch at anytime, contact us on *020 7337 0777*, or email *info@killik.com*.