



INTRODUCING
KINGSWOOD



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At Kingswood our goal is to give you the confidence to help you build your ideal financial future.

We understand that planning your finances can be a daunting task, that is why we are here to help you identify your goals to make a start.

We pride ourselves on being a client centred company. We are always investing in innovation and new technology with the core belief that we provide the best client experience for you.

Founded in 2010, our vision is to provide leading financial services to clients at all stages of their financial journey, helping you to Protect and Grow your wealth.

We are proud to be local and regional. You can find us all over the UK, employing local people, we work together to understand you and your requirements.

WE ARE PROUD TO HAVE



over **10BN**
in assets managed



19.3K
active UK clients



22
offices in the UK



over **300**
employees

(As at January 2023)



We strive to understand you and your goals to help you realise your financial dreams.

OUR RELATIONSHIP WITH YOU

We work hard to build everlasting relations with our clients and their families, building relationships that will exist for generations.

We care about being a trustworthy business. Our financial advisers and investment managers are here to help whenever you need us, always going the extra mile for our clients.

We inspire financial confidence and believe everyone should have access to financial advice, that's why your first conversation with one of our advisers is free, without any obligations.

We offer a holistic service, bringing your wealth management services under one roof.

CLIENT-CENTRIC
TRUSTWORTHY
INSPIRING FINANCIAL CONFIDENCE

At Kingswood, we put our clients at the heart of everything we do.

We want to understand your needs and help bring your goals to life no matter what level of financial knowledge you might have. We will listen and build a plan around what's important to you and your values.

“ **My adviser is excellent.** Professional, patient, helpful and mindful of my needs throughout.

“ My adviser ensured that my money has been invested to meet my needs. He has also been **very approachable** when I need further financial advice, and has always provided explanations for his recommendations in plain understandable terms.

“ My adviser gave me **insightful advice** from the beginning, helping me work out what was best for me and the family.

We are proud to be rated **4.8** by clients on



HOW WE WORK WITH YOU

Our focus is to make sure your financial journey is smooth and seamless. We make time to review whenever necessary and aim to inspire you with financial confidence.

The value we bring is being able to listen and talk you through the important areas you should consider in financial planning in a clear and easy way to understand.

2. BUILD A PERSONALISED PLAN

We provide and implement a tailored plan, designed to help you achieve financial confidence.

1. GETTING TO KNOW YOU

We look at your entire financial position, your needs and what you want to achieve in life before helping you plan how to get there.

3. EASY ACCESS

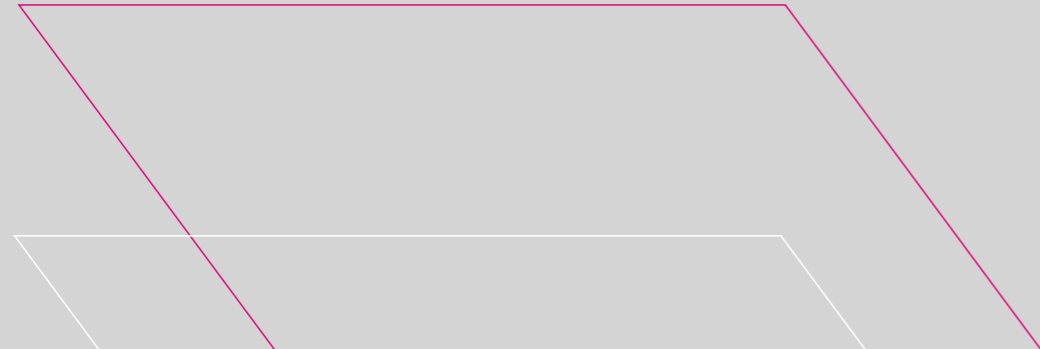
We bring your financial plan to life through our all in one app and portal Kingswood Go.

4. KEEPING YOU ON TRACK

We arrange annual reviews to analyse, review and adjust your plan where necessary. Reviewing more frequently if needed.

5. EVERLASTING RELATIONSHIP

Building a relationship with you is our key priority and we are there with you throughout your life.



KINGSWOOD WEALTH PLANNING

We provide a range of financial planning services to help you at any stage in life, tailored to your financial goals.

By understanding your personal ambitions and getting a clear picture of your financial situation, we can help optimise your personal wealth to create your ideal financial future.

Where suitable we work with Kingswood Investment Management to align our clients investment needs.



YOUR FINANCIAL LIFECYCLE



PROTECTION FOR YOU AND YOUR FAMILY

We help you prepare and protect you and your loved ones from any unexpected life events.



MAKING THE MOST OF YOUR INCOME

Our tax planners can help to maximise our client's income, reducing the amount of tax they are liable to.

MORTGAGE ADVICE

At Kingswood, we focus on finding you the best available option to mortgages. We take our time to understand your ambitions and aspirations and attempt to find solutions through expert advice and our connections.



RETIREMENT PLANNING

We can help you prepare today, for your future. Our specialist retirement planners will try to understand your position and the range of potential solutions that could help you achieve your financial goals.



GROWING YOUR MONEY

Bespoke and tailored investment plans to suit your needs. See pages 10 and 11 for more information on Kingswood Investment solutions.



PASSING ON YOUR WEALTH

The future of your children or grandchildren is something you want to secure and protect. We can help you find confidence in the future of your loved ones.

We have blended the IBOSS investment philosophy and track record with our leading client focussed Kingswood service to create our Kingswood IBOSS Managed Portfolio Service.

ABOUT IBOSS

Part of the Kingswood Group, IBOSS is a provider of investment solutions. IBOSS have developed a leading service proposition as recognised in a 5 star rating in the FT Adviser service awards and an enviable long term track record of high performance with low volatility.

“ The synergy of Kingswood and IBOSS gives us an exceptional opportunity to **enhance our client proposition and range of services**. Our investment philosophy is the same throughout all of the ranges managed by our highly experienced and trusted Investment Team.

—Chris Metcalfe
INVESTMENT AND MANAGING DIRECTOR, IBOSS

The value of your investments and the income received from them can fall as well as rise.

Kingswood IBOSS MPS comes in 4 different strategies, across a range of risk ratings.

<p>CORE</p> <p>Nine actively managed risk-rated model portfolios, that reflect the fund selection of the successful Portfolio Management Service.</p> <p>A service that retains all the popular features of our tried and tested PMS, but with the administrative and operational benefits of discretionary management.</p>	<p>PASSIVE</p> <p>Eight actively managed risk-rated model portfolios, using cost effective passive instruments that closely mirror the asset allocation of our core MPS. A service that offers lower annual fees through its passive orientation and accommodates the more cost-conscious investor.</p>	<p>INCOME</p> <p>Seven actively managed risk-rated model portfolios that closely mirror the asset allocation of our core MPS. A service that prioritises income producing assets, whilst still maintaining relatively high levels of diversification. Avoiding the risks of concentration and recency bias are particularly important factors in constructing the income range.</p>	<p>SUSTAINABLE</p> <p>Seven actively managed risk-rated model portfolios, built using funds within IBOSS' sustainable framework criteria, whilst closely mirroring the asset allocation of our Core MPS. In an area of the market which is particularly complex, we strive to achieve a superior level of diversification. The range caters to investors who wish to invest in organisations that commit to generating measurable social and environmental goals, alongside a financial return.</p>
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AVAILABLE ON THE FOLLOWING RETAIL INVESTMENT PLATFORMS



AWARDS
IBOSS Asset Management has won five-star awards at the Financial Adviser Service Awards in both 2020 and 2021. All of our portfolios are 5-star rated, and our Core portfolios are 5-diamond rated, by Defaqto.

KINGSWOOD INVESTMENT MANAGEMENT

Our highly experienced and qualified investment management team provide a range of investment management solutions depending on your needs and requirements.



Kingswood Personal is a fully bespoke investment service. Our Personal service is designed for higher net worth individuals who require a tailored service to their investments. Clients will have their own dedicated Investment Manager who will personally manage their funds.

“ I couldn't wish for a better investment manager to guide me through the ever changing economic minefield.



YOUR FINANCIAL PLAN AT YOUR FINGERTIPS

We are proud to provide our clients with technology that allows you to view your financial progress in the palm of your hand, wherever you may be.

Kingswood Go is an all-in-one digital finance app, which puts you front and centre in achieving your financial goals and dreams, giving you a complete picture of your financial life, at the comfort of your fingertips.

Kingswood Go gives you the opportunity to have all of your financial information in one place. Not only providing you with peace of mind, but if something were to happen to you it gives you security to know that all of your financial information would be accessible to your partner or dependants.

Via the Kingswood Go secure messaging system you can stay in touch with your Kingswood adviser and investment manager.

KINGSWOOD  **GO**
Bringing Kingswood to Life



THE KINGSWOOD SERVICE AT THE TOUCH OF A BUTTON





The value of your investments can go down as well as up and you may get back less than invested. Past performance is not a guide to future returns. Your home is at risk if you do not keep up repayments on a mortgage or other loan secured on it. Whilst we do provide wealth planning, we cannot provide tax advice and where you require tax advice we will refer you to a tax specialist.

Kingswood, Kingswood Group and Kingswood Institutional are trading names of KW Wealth Planning Limited (Companies House Number: 01265376) regulated by the Financial Conduct Authority (Firm Reference Number: 114694) and KW Investment

Management Limited (Companies House Number: 06931664) regulated by the Financial Conduct Authority (Firm Reference Number: 506600) with a registered office at 13 Austin Friars London EC2N 2HE. KW Investment Management Limited is also regulated in South Africa by the Financial Sector Conduct Authority (Firm Reference Number: 46775). Both companies are wholly owned subsidiaries of Kingswood Holdings Limited which is incorporated in Guernsey (registered number: 42316) and has its registered office at Mont Crevelt House, Bulwer Avenue, St. Sampson, Guernsey, GY2 4LH.

We would love to hear from you
so please do not hesitate to get
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