

Trigon

Planning for Life



Trigon Group offers you Lifestyle Planning and our aim is to help you 'Plan for Life'. You can achieve your dreams with our comprehensive financial management solutions.

About Trigon

Trigon Group incorporates a well established Financial Planning Practice and an advisory and administration firm. Based in Hatfield in Hertfordshire, Trigon was established in 1996 and supports an expanding and loyal client base.

Trigon's directors are all Independent Financial Planners with extensive knowledge and experience in a wide range of specialist areas of Individual and Corporate Financial Planning.

Our Team is highly qualified and experienced in meeting the often complex wealth planning needs of individuals and businesses.

Trigon Group comprises Trigon Financial Ltd and Trigon Associates Ltd. Trigon Associates Ltd is authorised and regulated by the Financial Services Authority.

Our Philosophy

Our objective is to provide bespoke wealth management solutions to ensure you are sufficiently financially organised to create as much wealth and security as possible for yourself, your family and your business.

We will work with you to identify your financial objectives and provide the continuing service you need to create and maintain your financial independence.

Our professional expertise, combined with our access to the whole market, will ensure you receive the best possible solutions and peace of mind.

As we help you to achieve your aims and objectives, we look forward to becoming your primary source of financial advice.

“ I look to the future because
that's where I'm going to
spend the rest of my life ”

George Burns



About Our Services

We understand that all of our clients are individuals and have different needs in relation to their financial well-being. We therefore offer the following services which are tailored to each individual's needs.

Financial Advice Service

Suited to clients who have a specific financial need, this service delivers solutions to known or expected problems.

Through analysis of your financial situation, and our knowledge of and experience in financial solutions - we will provide you with qualified recommendations regarding the actions you should take.

This component of our overall service is focused on addressing needs, gaps and shortfalls and some of these services are regulated by the Financial Services Authority.

Example solutions might be:

- ▶▶ Protection for you and your family
- ▶▶ Retirement Provision
- ▶▶ Inheritance Tax Mitigation
- ▶▶ Investment Portfolio Services

Lifestyle Planning Service

Taking a broader and more comprehensive view of your circumstances, our Lifestyle Financial Planning service offers you the opportunity to get involved and take greater control of your financial destiny.

Acting as your financial mentor, we help you to determine what is most important to you; identifying your fears, hopes and aspirations for the future.

We show you how your future might look if you don't take action, and what it could look like with the benefit of active planning.

With a focus on 'effective money management' this service provides you with a personal financial plan to refer to, and regular meetings with your Financial Planner to review and update your plan as your circumstances change over time.

Whether you consider yourself to have too much, too little or just enough money – you can enjoy the benefits that this service delivers. Your financial plan may even reassure you that you can take advantage of a lifetime opportunity or pursue a lifelong dream!

Trigon Optimised Portfolio Service (TOPS)

This service is available to all clients who want their investments to achieve:

- ▶▶ Long term consistent returns
- ▶▶ Reduced volatility
- ▶▶ Returns that are designed to match their expressed needs and goals
- ▶▶ Broad diversification (i.e. you don't want to put all of your eggs in one basket)

And can be provided in conjunction with our Advice, Planning or Corporate Services.

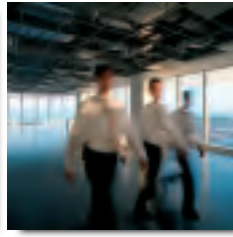
Specialist Services

As part of our comprehensive approach to Lifestyle Planning we work alongside your other professional partners such as Accountants, Solicitors and Will Writers to deliver additional services for your benefit.

These include:

- ▶▶ Probate
- ▶▶ Will Writing
- ▶▶ Estate Preservation
- ▶▶ Tax Returns

“ It's never too late
to start planning
for the future ”



Corporate Services

In today's increasingly uncompromising business environment, inadequate planning can result in disaster. With the right professional guidance the pitfalls that could otherwise destroy your business may be avoided.

A complete advisory service is available to corporate clients covering all aspects of financial advice for both directors and staff alike.

Advice is provided on a wide range of pension and employee

benefits available, including the implications of legislative changes and recommendations for the most appropriate arrangements to suit your business.

- ▶▶ Protect your key assets
- ▶▶ Protect your profits
- ▶▶ Plan for your retirement
- ▶▶ Protect your employees and their families
- ▶▶ Reduce your business tax liabilities

“ You may delay
but time will not ”

Benjamin Franklin

Start 'Planning for Life' now.

Trigon

Marquis House 68 Great North Road Hatfield Hertfordshire AL9 5ER

Tel: 01707 251253 Fax: 01707 251254 Email: info@tri-group.co.uk Web: www.tri-group.co.uk

Not all the services mentioned in this brochure are regulated by the Financial Services Authority.

Trigon Associates Ltd is authorised and regulated by the Financial Services Authority

Trigon Associates Ltd and Trigon Financial Ltd are part of the Trigon Group of Companies.