

Hello from First Wealth. We're a Chartered financial planning firm based in Marylebone, London

We're on a mission to make first-class financial planning accessible to everyone! Working together to help achieve what matters most to you in life.

Sound good? Life changing financial planning starts right here! There is no fee for our initial phone call or meeting, so you have nothing to lose. To discuss how we can help you with your financial future, call us **020 7467 2700** or e-mail: **hello@firstwealth.co.uk**.



What do we do?

Lifestyle financial planning:

We want to understand what matters most to you in life. We then work with you to build a comprehensive plan to achieve the things that are most important to you.

Wealth management:

We create and maintain an evidence-based portfolio that reflects the requirements of your financial plan.

Behavioural insight and coaching:

We're all prone to making bad financial decisions, so our insight and coaching is designed to keep you and your plan on track.



Who do we work with?

We're confident that our financial planning process can help most people, the majority of our clients are:

Entrepreneurs

Business owners growing their company

Professionals

Employed or self-employed, for example lawyers, accountants, architects

Executives

CEO, CFO, COO, Directors

At retirement

Either you've finished work all together, or you're in the transition stage between work and retirement.



How do clients feel when they approach us?

- Lack of confidence in their financial future
- Need help but not sure who to turn to
- Don't trust financial services
- Frustrated by the ongoing complexity of financial regulation.
- Worried about what the future will look like.
- Struggling to balance all the competing financial demands.
- Anxious to avoid costly financial errors.
- Bombarded with conflicting messages in the financial press.

How do clients feel after the planning process?

[Confident]

[Inspired]

[Free]

Why choose us?

Our award-winning financial planning has helped our clients live their best life. We would love to help you too.



“They’re brilliant for taking all that information and helping you structure financial plans to enable you to live that life.”

Imogen Landy - Client Since 2015



“I want to retire, be comfortable in my skin, be comfortable about what we are spending and know that at the rate at which we live, nothing’s going to run out.”

Andrew McCoig - Client Since 2009



“One of the things that I remember my father saying was that nobody wants to be the richest man in the graveyard.”

Antony & Patricia - Clients Since 2017

The First Wealth team

We’re energetic, knowledgeable, caring and fun. Our life and families are important to us all. We want to work with like-minded people to help get the most out of life.



Our core values



Excellence

Setting high standards, always looking to improve



Ambition

Our mission is our Moonshot. One life, make it count



Respect

We understand the hugely important role we have in shaping peoples futures



Helping others

It’s a pleasure to see our clients living their best life



Happy people

We smile and have fun
Laughter energises us

call: 020 7467 2700 **email:** hello@firstwealth.co.uk