Vantage

Wealth Advisory Services

A clear view on your financial wellbeing

Vantage Wealth has a highly qualified team of experienced consultants. We are dedicated to advising our clients, both individuals and businesses, on how to manage their finances to ensure their financial security both now and in the future.

We operate a fully transparent “new model” fee-based service on a wide range of product areas, from investments and savings to insurance and pensions.

Our clients

Our clients include high net worth individuals, business owners and professionals, such as lawyers, accountants, directors and trustees, many of whom are time-poor and value our advice.

We also offer a specific service dedicated to trustees in respect of assessing suitability of investment strategy, independent reviews of existing arrangements and setting investment policy statements and appropriate asset allocations.

How we operate

Vantage is not tied to any particular financial institution as we offer our services on a “whole of market” basis and therefore our interests are always aligned with those of our clients.

We offer our initial discussions on an ex-gratia basis in order to fully understand what is important to our clients and to explain how we are able to offer value with each individual business relationship.

Advice areas

Business

- Corporate pension schemes
- Group critical illness
- Group income protection
- Group life insurance
- Keyman/shareholder protection

Investments

- Investment suitability review “APTa”
- Investing for income
- Investment trusts
- Collective investment funds
- Offshore investments
- Socially responsible investments

Pensions

- Retirement Trust Schemes
- Annuity purchase
- Pension consolidation
- Pension drawdown
- Pensions and retirement planning
- Pensions review
- Pensions transfer

Services for trustees

- Investment suitability review “APTa”
- Investment policy statement writing service
- Portfolio monitoring
- Platform/wrap solutions
- Life wrapped solutions
- Non-standard life cover
- Holistic review

Protection

- Accident and sickness
- Critical illness
- Income protection insurance
- Life insurance
- Long term care

Savings

- Lump sum
- Regular savings
- Savings for children
- School fees planning

Expatriate finances

- QROPS
- QNUPS
- Offshore collective investment schemes
- Offshore bonds
- Protection

Financial planning

- Holistic financial planning
- Wealth management
- Cash flow analysis
- Asset and liability statements

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Version: 7 (May 2019)