



Executive Financial Counselling (EFC)

Empowering your financial future

Executive Financial Counselling provides key executives and employees within your company with access to trusted financial guidance and advice. In today's complex financial planning environment, where legislation continues to evolve, EFC ensures your key colleagues receive expert guidance to navigate their financial future.

Our complimentary service provides **personalised, holistic financial planning that goes beyond traditional 'vanilla' advice**, helping your employees make informed decisions about their personal short and long-term financial security.



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A bespoke, holistic service delivered with impartiality, expertise and, importantly, care.

Why EFC?

In an ever-changing financial landscape, your colleagues need more than just a pension scheme. They require comprehensive financial guidance and advice that considers their individual circumstances and objectives. This includes:

- personal financial planning
- incorporating tax-efficient investment strategies such as pensions, Individual Savings Accounts (ISAs) and Venture Capital Trusts (VCTs)
- targeted retirement income planning
- individual or family protection

About Mattioli Woods

When sponsoring or introducing any organisation to your staff, you need to have a great deal of confidence in both the organisation and the individuals who represent it. This is especially important when introducing a firm to look after the financial welfare of your employees.

Mattioli Woods provide a complete package of services in the field of employee benefits, enhanced further by a strong financial planning and wealth management division. Mattioli Woods' core strengths lie in providing a bespoke, holistic service delivered with impartiality, expertise and, importantly, care. We're proud of the long-term relationships we have developed with clients over the last three decades and we now have:

- over £16 billion assets under advice and administration
- 16,000+ corporate and private clients
- offices throughout the UK and Northern Ireland

Are you ready to enhance your employee benefits package?

Get in touch

Email info@mattioliwoods.com today to learn more about our Executive Financial Counselling services.