

Executive
decision-makers
have unique needs,
for which we
provide bespoke
Financial Counselling



Executive financial counselling

When it comes to company directors and executives, financial needs tend to be more complex, particularly when they are also a major shareholder of the business. Requirements often need to take family arrangements into account too and, in many cases, the benefits provided to other staff may not be appropriate.

We can provide such individuals with a more holistic approach to their financial planning, balancing the needs and requirements of the business with their own personal circumstances.

Developing a close working relationship is key in gaining a full understanding of your employees' prospective financial position, issues and objectives.

A typical initial meeting would look at:

- short-term goals, which could include building savings to meet emergencies, or ensuring family members are protected in the event of death or ill health
- medium-term goals, such as planning for school and/or further education expenses
- long-term goals, which could cover planning for retirement, and passing wealth to children in a tax-efficient way.

Our consultant will review your executive's existing arrangements in full to identify any gaps or shortfalls, making appropriate recommendations to remedy these, and, as it is important we build lasting relationships, we will review the arrangements annually, ensuring they continue to meet the goals that have been set.



Get in touch

For more information, or to arrange a meeting to discuss your employee benefits strategy and employee communication options, please email us at info@mattioliwoods.com, or contact your Mattioli Woods consultant.

Mattioli Woods plc is a leading provider of wealth management and employee benefit services. We pride ourselves in building long-term relationships to provide trusted advice, high standards, and a personalised delivery. We provide our clients with an all-embracing and integrated approach that is designed to develop a clear strategy for financial plans, supported by sound investment and taxation initiatives.

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