



Liz Maudsley Financial Planning

NEWSLETTER ISSUE 1

LIZ MAUDSLEY FINANCIAL PLANNING IS AN ASSOCIATE PARTNER PRACTICE OF
ST. JAMES'S PLACE WEALTH MANAGEMENT

December 2020

WELCOME

Welcome to our brand new quarterly newsletter which aims to share the latest Practice information and activities which we hope you will find informative and useful. The idea is to make it easy for you, our clients, to stay in touch, get to know the team and how we are working on your behalf to deliver outstanding service. We will also share how the Practice can help you to keep up to date with your financial planning. I believe that our values which place our clients and their financial wellbeing at the centre of everything that we do, are demonstrated through our commitment to an ongoing and connected relationship.

My commitment to all clients is to provide a highly personalised service so that you consider me to be your trusted financial adviser for many years to come. I will help you make informed decisions to achieve your financial goals through personal, face-to-face and virtually delivered advice.

Liz Maudsley



2020 HAS BEEN A CHALLENGE FOR ALL OF US...

Dealing with COVID-19 has affected our daily lives in so many ways. It has undoubtedly reinforced the importance of keeping in touch and fast tracked us all into incorporating technology in ways we previously would not have used.

WAYS CLIENTS HAVE KEPT IN TOUCH HAVE INCLUDED...



TELEPHONE



SMS



EMAIL



WHATSAPP



TEAMS



ZOOM

Many clients have been able to talk through concerns as they have arisen which has been reassuring and given them peace of mind about their financial plans.

PROVIDING SPECIALIST CLIENT SUPPORT

We are planning to run a programme of client events in 2021, initially virtual with the hope of face to face when we are able to meet in groups again.

Topics that our clients have indicated to be of interest include:

Navigating retirement planning and what Pension Freedoms mean in practice

Succession Planning - how to pass on your wealth tax efficiently

Protecting you, your estate and investments from unexpected events (e.g. COVID-19)

FINANCIAL WELLBEING

What a year it's been for health and wealth!

It looks like we're about to turn a corner with the imminent release of vaccines which will hopefully mean a healthier 2021 for all.

It has never been more important to understand and manage finances to deal with the disruption this year has brought.

After a difficult start, 2020 has seen the markets making significant recovery and progress.

Keeping track of your financial plans is crucial to an overall sense of personal and financial wellbeing. Please get in touch if you wish to discuss any aspect of your financial plans.

Financial Education and advice makes this easier to do.

See what we are doing to support this on the next page.

www.lizmaudsleyfinancialplanning.co.uk

Telephone: 01865 292077 Mobile: 07920 296555 Email: liz.maudsley@sjpp.co.uk



Liz Maudsley Financial Planning

NEWSLETTER ISSUE 1

LIZ MAUDSLEY FINANCIAL PLANNING IS AN ASSOCIATE PARTNER PRACTICE OF
ST. JAMES'S PLACE WEALTH MANAGEMENT

December 2020

MEET THE TEAM



LISA TRUMAN

Practice Administration and Support

Lisa works behind the scenes making sure that whatever our clients need, we deliver. It will often be Lisa that you speak to in the first instance to carry out an instruction. She is also a whizz on setting clients up with Online Services and e-briefing financial education articles.

lisa.truman@sjpp.co.uk

Mobile: 07481 836416



PAUL MAUDSLEY

Client Relationship Lead

Paul is new to the team and is supporting the many Financial Education initiatives we are delivering whether to SME businesses or personal client events.

paul.maudsley@sjpp.co.uk

Mobile: 07949 474922

WORKSHOPS AND SEMINARS

FINANCIAL EDUCATION IN THE WORKPLACE

We regularly partner with organisations such as the COOP HQ to deliver workshops and seminars for employees to help understand the importance of personal and family financial planning.

FINANCIAL WELLBEING FOR WOMEN

The financial journey of women differs to men at certain points in their lives. Navigating these financial upheavals requires planning to ensure future financial security.

FINANCIAL EDUCATION FOR YOUNG PEOPLE

We aim to bridge the gap created by the lack of financial education in schools. This is to help young people gain an understanding of basic budgeting and creating sound financial habits and behaviours.

HELP US TO HELP YOU

ONLINE WEALTH ACCOUNT

GREAT FOR CLIENTS...

GREAT FOR THE PLANET...



Are you registered for our online wealth account services? It's easy to set up and get started. You can access your portfolio 24/7.

Click here to register or visit our website to sign up.

Like to know more about understanding personal finances and learn at your own pace?

Sign up for our e-briefing service to receive regular articles to improve your understanding of investing, retirement options, protecting your family or business amongst other topics.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested. The levels and bases of taxation and reliefs from taxation can change at any time. The value of any tax relief depends on individual circumstances.

Liz Maudsley Financial Planning is an Appointed Representative of and represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website www.sjp.co.uk/products. The title 'Partner Practice' is the marketing term used to describe St. James's Place representatives.

www.lizmaudsleyfinancialplanning.co.uk

Telephone: 01865 292077 Mobile: 07920 296555 Email: liz.maudsley@sjpp.co.uk