

# Financial Planning & Wealth Management



**C. Alexander & Partners Ltd**  
FINANCIAL SERVICES

# Financial Planning & Wealth Management

**C Alexander & Partners Ltd** has been established for over 20 years. As independent financial advisers, you can be assured of impartial advice without ties to any insurance product provider. As professionals, we believe it is essential for our clients to feel at ease with the advice and help we provide. Our highly personal and distinctive service reaches beyond the limitations normally associated with those in our field.

## **Our comprehensive range of financial services includes:**

- Capital Investments
- Tax Advice and Planning
- Employee Benefits and Group Pensions
- Personal Protection
- Estate Planning – Inheritance Tax and Use of Wills and Trusts
- Retirement Options – Income Drawdown, Annuity Purchase
- Business Capital Raising
- Directors Remuneration Packages
- Succession and Exit Strategies – for business owners
- Residential and Commercial Mortgages

## **Your home may be repossessed if you do not keep up repayments on your mortgage.**

For Inheritance Tax Planning we usually act as introducers only.

For residential mortgages, we are usually paid by a combination of fee and commission. A non-refundable fee of £195 is payable by you, for our mortgage advice service, before we send you our recommendation report for your mortgage. We may also receive commission from the lender, which is fully disclosed. Based on a £100,000 mortgage a commission payment is typically £350. If you prefer, we can be paid a fee of £1000 for our advice and recommendation in connection with your mortgage, payable when we make our recommendation and we will refund to you any commission we receive from the mortgage lender.

The Financial Services Authority does not regulate Will Writing, commercial mortgages or some forms of tax planning, estate planning, or trust planning.

# Divisions

The expansion of **C Alexander & Partners Ltd** has led to the creation of two divisions.

## Sporting and Entertainment

Our longstanding involvement within the sporting and entertainment fields has led to us gaining a highly respected reputation with both groups and individuals in these sectors. Furthermore, we have a wealth of experience in supporting young talent right from their very first steps in launching a career, to them reaching the pinnacle of their profession, and beyond.

As a committed and established team, we invest time in building relationships and trust. Always seeing you in person to discuss and understand your needs is a priority for us. We embrace communication technology, so whenever you need our support we are available.

*"Advisor, sage, all round good egg and most importantly, friend. Thanks for everything"*

**David Prutton, Sheffield Wednesday**

*"Thanks for all your help – you're a true friend"*

**Harry Kewell, Melbourne Victory & Australia**

*"Thanks for everything you do for me. What would I do without you?"*

**Michael Dawson, Tottenham Hotspur & England**

## Corporate and High Net Worth Individuals

The success of C Alexander & Partners Ltd, from our origins as a family business ensures that we appreciate the interests of companies both large and small.

Based in Nottingham, we have a thorough knowledge of the East Midlands business market, in addition to advising national and international organisations.

With both corporate and high net worth individuals, we work closely with your accountancy and legal advisers, so you can be confident that your objectives are achieved and fully understood by each specialist. Our experience shows this approach enables you to be given 'best advice'. Naturally, we will look to incorporate your existing arrangements within any new recommendations. Once the objectives are agreed we make sure they are implemented in the most efficient manner.

*"Thanks for everything"*

**Andy Reid, Nottingham Forest  
& Republic of Ireland**

*"Thanks for all your help, long may it continue"*

**Chris Read, Nottinghamshire  
& England**

*"Thanks for everything you do for me. I would be broke without you!"*

**Alan Maybury, St Johnstone  
& Republic of Ireland**

# The team

Both David and Samantha are qualified at Diploma level.

## **David Picker DipFA AIFP** – *Managing Director and founder*

David is head of our sports and entertainment division, as well as advising a limited number of individual high net worth and corporate clients. He has nearly 30 years industry experience. Outside of business, David's interests are football and golf.

## **Barry Butlin** – *Financial Adviser and Mortgage Manager*

Barry has over 20 years experience in financial services following his career of almost 15 years as a professional footballer. His wide ranging knowledge includes investments, pensions and mortgages. Barry enjoys keeping fit and is still involved with football.

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## **Samantha Hayes DipFA**

*Financial Adviser & Retirement Options Specialist*

Sam has over ten years' industry experience and is responsible for research analysis and writing client reports. She enjoys generally keeping fit, walking, swimming, watching football and DIY.

## **Krystine Froch** – *Head of Administration*

Krystine has been with us since our foundation and is responsible for the smooth running of the company and client administration.



**C Alexander & Partners Limited**

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C Alexander & Partners Ltd is an appointed representative of Sesame Ltd which is authorised and regulated by the Financial Services Authority.

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