

Financial security is a top priority for the majority of people. If you are one of these people, it goes hand-in-glove with the wellbeing, security and safety of your family. So, how do we achieve financial security for you?

Financial security is dictated by our life goals, disposable income and expenses. Concept Atterbury's financial planners help you to create a well-designed roadmap to financial security using highly considered and thoroughly researched methods.

- **Financial planning**
Our consultants use highly sophisticated tools and internationally recognised methodologies to analyse your information and present you with proposals for risk cover, investments, estate and retirement planning.
- **Investment planning & wealth management**
Whether it's capital for a specific goal, or income in retirement, we take into account your tolerance of investment risks, but also the investment strategies you need to follow to reach your goals.
- **Retirement planning**
We can determine how much capital you will need in retirement to fund your income and capital requirements – as well as the most appropriate way to save for it.
- **Investing**
We have access to investment funds across the risk spectrum, ensuring that we select the most appropriate investment for your capital and savings.
- **Personal risk planning**
We can help you determine your financial exposure and the best forward-thinking plan of action for eventualities such as disability, or a critical illness such as cancer or a heart attack.
- **Estate planning**
Probably the one certainty in life is that we will all eventually pass away. Guaranteeing that your loved ones are not left high and dry should be a priority. We'll help to devise the best solutions to ensure their financial stability and comfort after you are no longer here.
- **Business continuity**
We can provide advice on and help you set up the most appropriate funding structures for buy-and-sell agreements to make sure there is a buyer for your share of the business in the event of your death or disability.
- **Short term insurance**
We will assist you in finding the most appropriate personal and commercial solutions that suits your unique needs.