

**gemini**  
professional financial group



*Your money - Your future*



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Twenty first  
century wealth  
management

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# Welcome

Gemini Wealth Management is an award winning, regional Independent Financial Adviser practice located in the West Midlands delivering over 250 years of combined adviser experience.

Our hands on service provides you with impartial, unbiased and objective financial advice with a view to achieve your financial goals, both for your immediate situation and for the longer term.

## Our Approach

Gemini offer financial planning, wealth management and bespoke financial services. We work in partnership with you and your other professional advisers, such as your accountant or solicitor, to develop long term relationships and gain an in depth knowledge of your needs, goals and objectives.



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Creating financial  
security for you  
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Investing in  
your future

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# About You

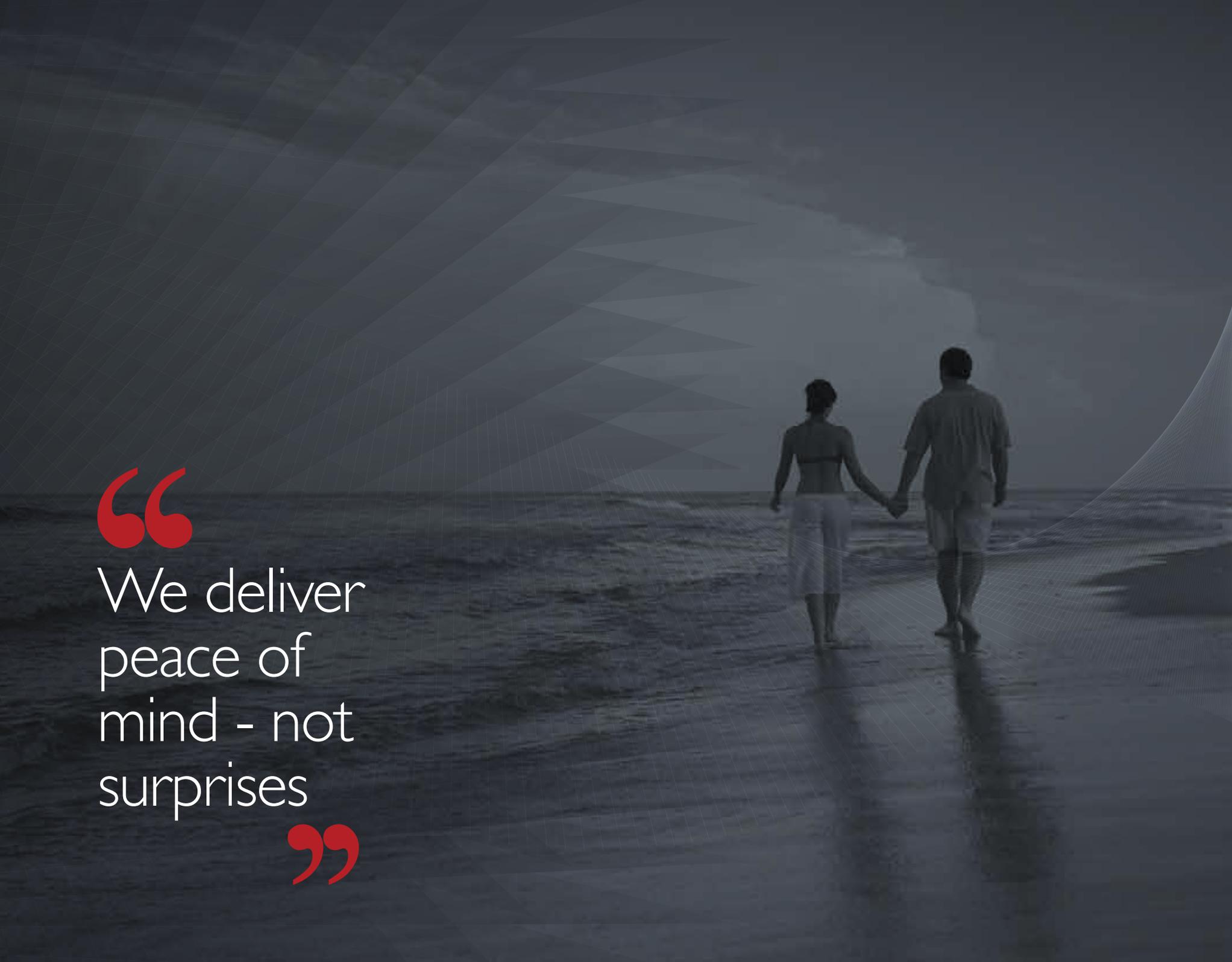
As you are reading this, you must be interested in personal financial planning for yourself, your partner, your family or your business.

- You should be able to relax about your money and focus on what is important to you
- You would like to take the worry out of your financial life
- You have specific financial goals and a desire to provide for you and your loved ones
- You welcome and recognise the value of expert advice and dealing with a trusted professional business.
- You want to feel reassured about your finances and excited about your future
- You appreciate knowledge and experience and the ability to speak to your own personal financial adviser backed by a team of specialists

If this sounds like you, and you would like to know more, we would love to meet you.

You want to plan for tomorrow - today





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We deliver  
peace of  
mind - not  
surprises

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# Our Services

Financial planning and wealth management can be complex and often confusing for some people. Gemini's approach breaks down these barriers, which allows our advisers to communicate clearly and make sure that you fully understand any recommendations or suggestions and take the time to talk you through each step of the process.

## Our services include:

- Retirement Planning
- Investment Planning
- Pension Advice
- Tax Planning
- Savings Advice
- Corporate Advice
- Employee Benefits
- Individual Savings Accounts
- Estate Planning
- Discretionary Fund Management Services
- School Fees Planning
- Long Term Care Advice
- Inheritance Tax Planning
- Income Drawdown
- Protection Insurance
- Pre-Retirement Planning
- Director Benefits
- Wealth Management Services

As a Gemini client, you will benefit from unrivalled service levels giving peace of mind that, whatever financial 'life stage' you are at, your finances are being well looked after.



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For your lifelong  
financial journey  
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# Our Commitment to you

Gemini are proud of the service that our clients receive. We don't make outrageous promises and we won't insult your intelligence, we simply state that:

- We seek to understand you - we focus on what matters to you
- Holistic financial planning (not selling) - we examine all areas of financial planning to achieve your aims and objectives
- In-house Investment Team - our team will provide you with regular portfolio reports whilst continually monitoring your investments. Keeping you fully informed and up to date
- Protect your assets - we specialise in ensuring your hard earned money goes where YOU want

What you see is what you get. Ours is a transparent, no surprises approach, with no hidden fees.

Our philosophy has evolved through these commitments so we can operate a simple, holistic, client centered approach.

Helping people achieve **financial freedom**



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Together we  
will help you  
work towards  
your goal

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# Our Group

Gemini Wealth Management is part of the Gemini Professional Financial Group. The group was established to bring all of our professional services divisions together to offer a complete, holistic service to our clients.

## **The Group consists of:**

- Gemini Wealth Management (advisory services)
- Gemini Estate Planning and
- Gemini Asset Management (discretionary fund management services)

All of our team, across any of our companies have a vast pool of knowledge to call upon. Our pro-active approach can open up areas of your financial 'well-being' that you perhaps hadn't originally considered. This enables us to offer cross-divisional solutions in line with your individual requirements.

This complete approach, coupled with our existing relationships with other professional services contacts, allows us to offer the highest level of service to our valued clients

**Safeguard** the future



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Trust us  
to protect  
you for now,  
and for the  
future

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**gemini**  
professional financial group



**Gemini Professional Financial Group**

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Gemini Wealth Management Limited and Gemini Asset Management Limited are both Authorised and Regulated by the Financial Conduct Authority.