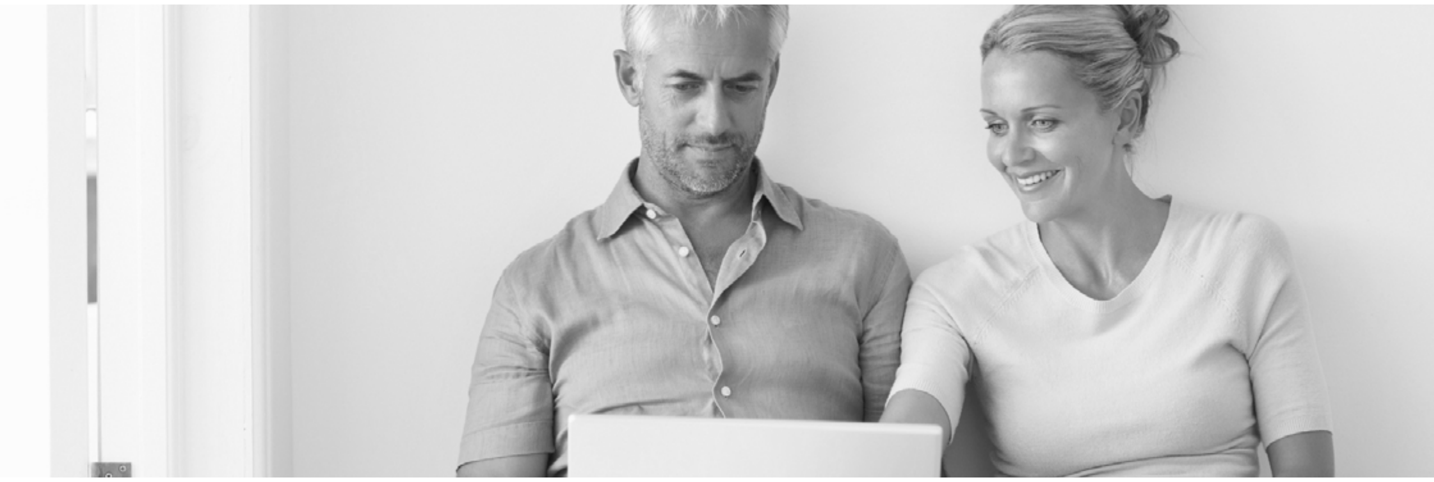
Constellation
Financial Solutions Limited



Expert advice for individuals and businesses

At Constellation, our Directors have been providing expert financial advice and top-quality service to clients for many years. From investment strategies, retirement planning and protection policies, to inheritance planning, tax mitigation and cash management, we understand that for solutions to be truly effective they have to be tailored to your unique circumstances. Representing the interests of our clients – both individuals and businesses – through a network of relationships with accountants, lawyers, fund managers, insurers and other professionals, we provide first class advice today to help you prepare successfully for tomorrow.

Investment strategies
• Assessing risk and reward
• Asset allocation
• Creating an individually-tailored portfolio
• Regular reviews and advice

Cash management
• Investment planning
• Income planning
• Budgeting

Retirement planning – corporate and personal
• Establishing pension funds
• Managing pension funds
• Retirement income options

Protection solutions
• Business and Key Man protection
• Income and share protection
• Personal protection

Inheritance planning
• Inheritance tax planning*
• Trusts and wills*
• Generational wealth planning

Tax mitigation*
• Inheritance Tax
• Income Tax
• Capital Gains Tax

Financial liaison
• Accountancy*
• Legal*
• Insurance

* These areas are not covered by the Financial Conduct Authority

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