

Who we help

Our purpose at Cambridge Partners is 'helping build better futures'.

We love helping our clients protect and grow their wealth, enabling them to live the lives they want to live.

While we would love to help everyone, over time we have developed an understanding of who can benefit the most from our services.

Typically, our clients are individuals looking for personal guidance or planning. Sometimes they are trustees of a trust or directors of a charity/institution.

They demonstrate some of the following characteristics:

Financial Guidance

They want to receive advice or guidance regarding their finances.

Long-Term Stewardship

They value long-term stewardship of their wealth.

Trusted Relationship

They value personal relationships with trusted advisers.

Investment Assets

They have investment assets or funds available for investment.

How we help

Our team have developed expertise across a wide range of topics. Below is a list of some of the ways that we help our clients.

Investments

- Investment strategy development and wealth management
- Sustainable investment recommendations (ESG investing)
- Helping women to protect and grow their wealth (the option to work with a female adviser)
- Investing trust assets and facilitating trust annual meetings
- Institution and charity investment management, consulting, and statement of investment policy and objectives (SIPO) development

Planning

- Retirement planning and cashflow forecasting
- Goal identification and planning
- Business exit planning
- Legacy planning and facilitating family meetings

Specialist Expat Advice

- US citizen tax-efficient investment solutions
- UK pension transfers
- Investor visas

Professional Introductions

- Guidance regarding asset structuring, estate planning, and insurance planning
- Facilitating professional network introductions (accountants, lawyers, business brokers, real estate agents etc)

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