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Financial Planning | Wealth Structuring | Investment Advice

Overview

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Strabens Hall was founded in 2007 as an independent fee-based wealth advisory business. In 2018 we were recognised by Citywealth as the Financial Adcisory Firm of the Year.

Our clients are private individuals and owner managed businesses, with the vast majority having an international footprint.

Our company was initially established in London and we opened a further office in Hong Kong in 2015. Our international footprint helps us to advise clients with a profile in multiple jurisdictions, either as non-UK resident individuals or UK resident non-domiciled individuals.

How we work with companies

The majority of our work involves an interaction with other professional advisers that our clients have. Examples of the type of other companies we work with are:

- Private banks & wealth managers
- Tax advisers & accountants
- Family offices & multi-family offices
- Trust companies
- Lawyers

We always work with other professional advisers in a collaborative manner and will seek to support existing relationships that our clients have developed.

How we work with clients

There are two ways in which we engage with clients:

1. On a specific topic. We are frequently called upon to provide one time only advice to help clients on a specific topic, for example offshore pension advice
2. Ongoing relationships. We have an ongoing relationship with the majority of our clients. This means that we can ensure that any advice we give remains relevant and that we can continue to support our clients as their circumstances change

Firm Highlights

- Award winning - Citywealth Financial Advisory Firm of the Year 2018
- 25 years - Average Experience of the Management team
- Financial Planning, Wealth Structuring, Investment Advice
- 20 Employees in London and Hong Kong

We charge clients either on a fixed fee basis agreed in advance, or if the scope of the work is not clearly defined, we charge an hourly rate. We do not accept any commissions or other incentives from product providers, nor do we have any products of our own, meaning that our advice is entirely unbiased and independent.

Our proposition and services

Our aim is to help our clients create, conserve, enhance and enjoy their wealth. In doing so, we provide advice on the following areas:

- Pensions - Providing advice around building up a pension provision for future years, and more frequently, to give guidance as to how to best structure the pension provision on retirement
- Tax Efficiency - giving specific advice on tax efficient investments and wrappers. Examples include family investment companies, trusts, ISAs, EIS, VCT and BPR schemes
- Estate Planning & Protection which falls under two areas, strategic and tactical advice

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- Cash flow modelling - We use sophisticated cash flow modelling software to help inform our clients about financial outcomes for them, which further feeds into decisions around planning

- Investment management - we provide both an Investment Consulting and Monitoring Service (IMS) and a Managed Portfolio Service. The IMS provides performance, monitoring, management and consolidated reporting of both funds, asset managers and discretionary fund managers. The MPS delivers a range of highly diversified multi-asset portfolios suitable for a variety of investment objectives.

All of the above areas are ones that we consider for individuals with an international footprint. Specific examples that we look at with regard to international individuals are:

- Offshore pension planning
- Multi -currency investment advice
- Holding structures for UK property
- Protection planning
- International financial planning

We also provide advice to the companies that have often been the source of our clients' wealth. This encompasses the following areas:

- Corporate planning
- Group pension schemes
- Small Self-Administered Schemes
- Death in service
- Key person risk
- Group health protection
- Group income protection
- Pre-business sale structuring
- Co-shareholder protection

As much as we approach our relationships with clients according to specific advice topics, we also engage with clients on account of them having reached a transition point in their life. Examples include:

- Selling their business
- Approaching retirement
- Divorce
- Gifting money to the next generation

What sets us apart

- **Independence**: We are independent. We do not manufacture products and we provide unbiased advice towards any particular solution

- **Integrated Service**: A service that integrates financial planning and investment structuring, along with overall asset management to ensure suitability of investments held

- **Transparency**: Transparent fee structures with no hidden commissions align our interests with those of our clients

- **Expertise and Innovation**: Innovative and thoughtful solutions carefully managed as tax legislation changes, working with leaders in the legal, accounting and other technical fields

Contact us

If you would like to find out more about how our expertise can help simply contact us at

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2018 WINNER
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