



BERRY & OAK

CHARTERED FINANCIAL PLANNERS

# Chartered Financial Planners for family and for life



## Why Berry & Oak?

### It's not every day you find the perfect partnership, but when you do, life is good!

At Berry & Oak we have one clear aim - to help our clients do all the things they want to do in life. Our independent personal financial planning service helps you make informed decisions with complete peace of mind. Our clients choose Berry & Oak because we build a close, long term partnership rather than just offer a quick fix.

Many people struggle to find the balance between living their dreams and ensuring they have the potential to fulfil them. Finding this balance, is at the heart of everything we do.

The seeds of Berry & Oak were sown because we wanted to give our clients an exceptional, independent and bespoke service. Time is of the utmost importance. We take time to get to know you. We invest time so that we can plan your future together. We encourage you to take the time to live life to the full.

## Our promise to you

### Helping you get where you want to be

At Berry & Oak, we believe there is always a 'what next' and that together we can achieve the lifestyle you want for you and your family.

We want to ensure that you have the confidence, clarity and capability to maximise your life and we will be there with you, every step of the way, to keep you on track.

Below are the four promises that we make to our clients.



“Andrew was very welcoming and immediately easy to get along with. His professionalism stood out and we were quite confident that we had made the correct choice for dealing with our financial affairs. We are looking forward to a long and rewarding relationship.”

Client - North Yorkshire





“We really feel part of a ‘family.’ This is due to the care and consideration you have shown to us over the years. You show a concern not only to our financial needs, but also taking into account the history of our family, and where the future for them may be! This is what makes you as a ‘partnership’ very, very special to us.”

Dr & Mrs K Peacock - Grimsby

## What we do

### A service where you'll feel like part of the family

We build partnerships with our clients that grow stronger as the years go by, throughout each stage in life. We're totally committed to helping you and your family live the life you want, whilst freeing you from worries about what the future might hold. We do that through expert financial advice, intelligent planning and a willingness to always go that extra mile.

No two people are the same so we do not believe in 'typical clients' or 'off-the-peg' solutions. Every client is unique with their own values, aspirations and goals - and that's what we focus on. Your life. The advice and service you receive therefore needs to be unique, so we build a team and approach that is bespoke to you.

## How we do it

### It's when we come together as a team that the magic really happens

We have a proven six step financial planning process that is designed to build and deliver the best outcome for you and your family over the long term.



## Our journey together



## About you

### If it's important to you, it's important to us

At Berry & Oak, we believe you can achieve the lifestyle you want for you and your family. It just takes a bit of planning, some intelligent and innovative thinking - and a financial partner who really understands your needs and aspirations.

This is why it is important for us to spend time getting to know you, explain our thoughts in clear English and be there to support you every step of the way.

Are these questions that you ask yourself...

- **When will I be able to retire?**
- **Will my current retirement savings be sufficient?**
- **Can I afford to financially help my children?**
- **What is the most tax efficient way to do this?**

If you are ready to start talking about your 'what next' with someone that really wants to help you succeed, then please do give us a call on **01937 223055** and we can start the process of getting to know each other.

## Why work with us?

### The Berry & Oak Approach™

We know that men and women see things differently, so we like to have a male and female at every client meeting, wherever possible. We think this really helps to get a balanced view of every client's situation, letting us offer 360° advice that really resonates.

Having two people at each meeting also makes it much easier to drill down into the detail and keep a clear record of what has been discussed and decided. Then we'll feedback a list of agreed actions to you, so we all know who is doing what and by when.

When it comes to your money you want someone who knows what they're doing. So it's good to know that we're all professionally qualified, have many years' experience and work to the highest professional standards.

We are proud of what we have achieved, and we always aim to be the best at what we do. Our learning and development program ensures that all members of the team achieve the highest level of qualifications.



“New ideas were raised and options offered which I would not have thought of. Friendly approach with great comfort in being able to raise any matters.”

Dr N Kitchen - Maltby



At every step of the way we remind ourselves that being in control of your money and your future happiness is a very big responsibility - and one we take very seriously.”

Andrew & Sarah Elson  
Berry & Oak Directors



You're in safe hands **with Berry & Oak.**

**CISI Accredited Financial Planning Firm™**

As an Accredited Financial Planning Firm™ we meet the CISI's rigorous ethics, experience, competence and professional practice standards.



**Chartered Financial Planner Firm**

We have been awarded the prestigious title of Chartered Financial Planner which reflects how committed we are to developing and maintaining the knowledge and capability of our people so we can deliver the highest quality advice.

