

How we add value

MATHEWS
COMFORT
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1. Organisation

We help to bring unbiased order and management to your life. By adding structure, we are mapping your financial future, simplifying complex matters and giving you the confidence to achieve your financial goals.

2. Accountability

Understanding our advice is trusted and relied upon, we focus on building long-term relationships with people who are willing to put in the time, effort and capital. We will ensure you follow through on your commitments to achieve the future you desire.

3. Objectivity

We give impartial, professional advice based on your best interests, offering insight to help deter emotions that may cloud your judgements. We will guide you through every important financial decision that will help create and protect your lifestyle.

4. Proactivity

Our practical and hands-on approach allows us to anticipate important life transitions to ensure that you are financially prepared for the “what ifs”, rather than focusing on repairing and rebuilding your lifestyle.

5. Education

We have the knowledge to succeed. All of our financial planners are fully qualified and draw on many years of experience. We stay abreast of new legislation, latest products and the constantly evolving financial world. Despite this being a technical subject, we will ensure you completely understand every aspect of your plan and why we are doing what we are.

6. Partnership

We focus on building long-term relationships with our clients, as we feel the best possible outcomes are achieved when working in close collaboration with us, offering complete transparency and clarity.

7. Transparency

You will receive complete openness from us. We will always be honest with you and tell you the truth, even if it is not what you want to hear. As a company, we pride ourselves on our integrity.

8. Inspiration

We inspire and empower you to live the lifestyle desired on the money available to you.

9. Confidence

It is our job to ease your financial worries and give you the confidence to spend your money how you want to and do the things you want to.

10. Commitment

We are completely committed to our clients. If we don't feel we are making meaningful differences to our clients' lives, we will not be fulfilling our commitment.

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FINANCIAL
PLANNING