



money matters

Welcome to Gardner Financial Management

We provide private and corporate clients with truly independent financial advice. All of our staff members are trained to provide the customer service levels which you would expect from a professional organisation.

Whatever the economic climate, we will work with you to ensure that the financial products that you have remain suitable for your needs.

We will help you to make the right choices when planning your financial portfolio. We tailor solutions for your current and future situation to ensure that you have the most suitable products in place.

We believe Money Matters and this is our ethos, we use this across our social media platforms (#moneymatters90) to help clients understand how to look after their money and provide advice and guidance wherever we can.

“At Gardner Financial Management our aim is to make complex financial planning simple”

About us

Gardner Financial Management is a team of Independent Financial Advisers based in Hatton, Warwick. Together, our team has a wealth of experience in providing sound financial advice for both personal and corporate clients.

Our client base has been primarily built on personal recommendations from individuals and business professionals and this continues to be a major source of new clients.

As independent advisers, we are not tied to any single insurance company, bank, or building society, thus enabling us to research the market to find the most appropriate solution to our clients needs.

All of this ensures that the team at Gardner Financial Management delivers the highest possible standards of help and advice.

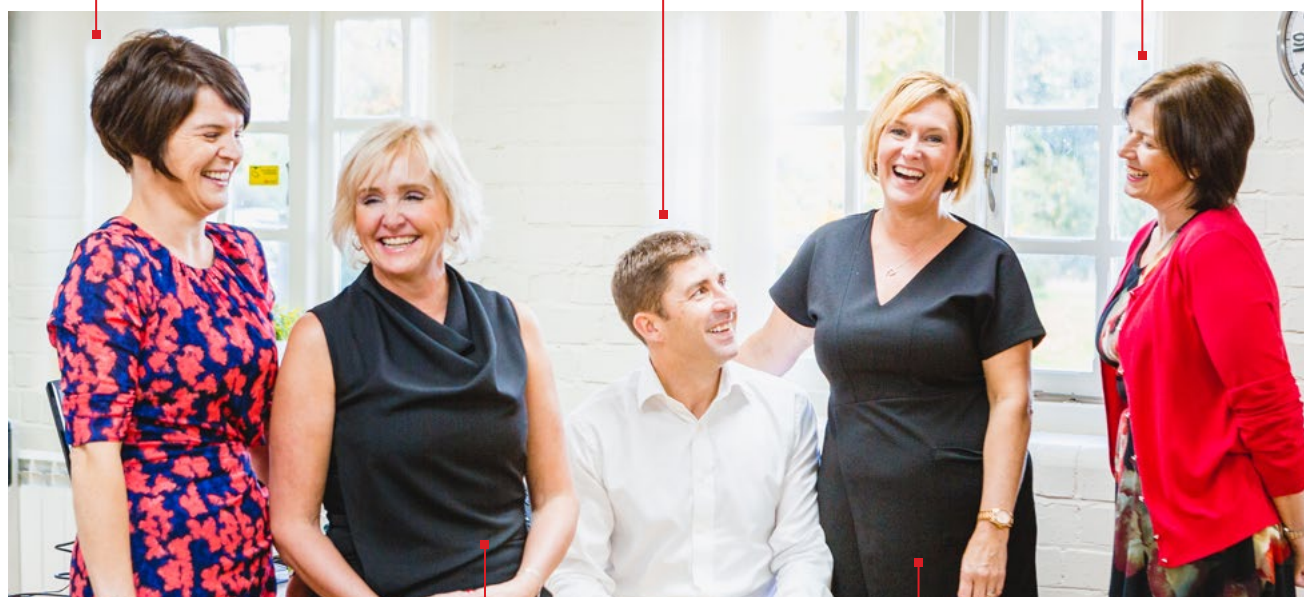


Our Team

Karen Blackwood
Customer Relationship Manager

Lee Gardner
IFA / Managing Director

Alison Watts
Mortgage
Administrator

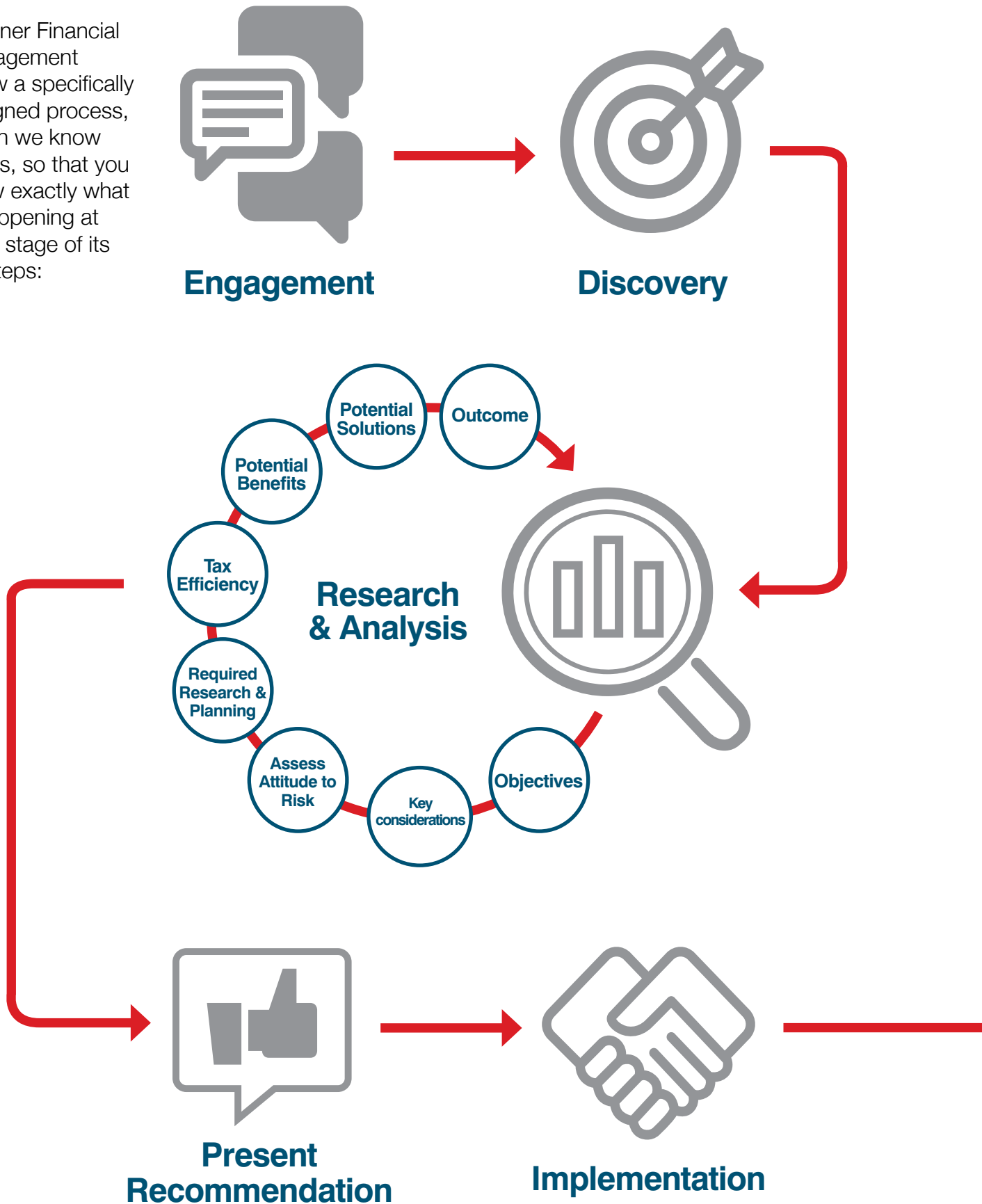


Debbie Turner
Mortgage &
Protection Advisor

Jacqui Gardner
Pensions specialist / Director

How we work with you

Gardner Financial Management follow a specifically designed process, which we know works, so that you know exactly what is happening at each stage of its six steps:



Our relationship & how we get paid

Fees incurred for our services depend on the type of advice we provide and the level of relationship you wish to have with us. You won't pay us any money or commit yourself to becoming a client of Gardner Financial Management, until you are sure we are the right financial planners for you

Our fees are clear and transparent and we pride ourselves on giving every client an accurate quotation on a case by case basis. We will provide a full explanation of the fees we intend to offer prior to commencing the Implementation stage.

Full details of our fees can be found in our Client Service Proposition document.

For more info contact Lee and he will be happy to explain in more detail:

Tel: 01564 732 770

Email: info@gardnerfm.co.uk



About Lee

Lee has been helping clients achieve their financial objectives for over 25 years.

Passionate about providing straightforward, simple independent financial advice Lee is dedicated to creating a meaningful, long term relationship with his clients.

Everyone is different and Lee will tailor a clients financial planning to suit their needs with an aim to create a well-balanced investment strategy, that is safely diversified and does not over depend on one type of investment or one investment company.

“I am driven by the desire to provide good sound independent advice to my clients now and in the future”

What we do

Our service is built around comprehensive financial planning and sound investment principles. We offer a wide range of specialist services including advice on investment, retirement, borrowing, protection and inheritance tax planning, including all types of pension schemes and employee benefits. Our focus is on both capital enhancement and capital protection.

Having completed a detailed review of your current position we will provide you with specific recommendations and explain the benefits and risks associated with the approach we have suggested.

We believe in providing a high quality service, with the emphasis on building long term relationships with our clients.

Our Services

We aim to give advice in a friendly, understandable manner and have built our business based on honesty, reliability and an excellent service.

Gardner Financial Management offer advice on a whole range of financial services including the following:

- Mortgage services
- Mortgage and family protection
- Income protection
- Health Insurance
- Critical illness cover
- Investment advice
- Pension Planning
- Options at Retirement
- Estate and trust planning
- General insurance

Business Services

We also specialise in working with the owners and directors of small to medium sized businesses. We will take time to understand what your business is all about, your plans for developing and growing the business and wishes for the future. We can also ensure your business is protected financially.

Please ask for our guide on how we work with businesses.



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