

Chase de Vere

The value of an
independent perspective



What independence means to us and what it will mean to you

With all the demands on our clients' time and ever-changing complex financial products and regulations, professional advice is crucial. But since January 2013, there have been two distinct forms of advice – restricted and independent. Many financial advisers, as well as those found within banks and building societies, are restricted – in either the type of advice they can give or the range of products they can recommend.

At Chase de Vere, we believe the only worthwhile advice is independent advice. This is because it allows us to research the variety of sources, and recommend the solutions and products that best suit your needs – creating a far stronger result.

The freedom to advise objectively

- True independence is a virtue: a virtue that allows freedom of thought and real objectivity.
- We are free to create financial plans that are totally unconstrained by any obligation – other than to you, our client.

- From investment management and estate planning, to employee benefits and business advice, we offer solutions that are drawn from the whole market.
- We give each solution careful consideration and only then recommend one that is right for you and your situation.
- We are a team, but we think and act independently. This helps us give a more considered, creative and sometimes non-obvious solution.

About us

- We are one of the country's leading independent financial advisers.
- We offer national coverage with over 200 independent financial advisers – expertly supported by 250 technical and office based specialists.
- Our advisers are encouraged to attain the highest levels of industry qualification and pursue advisory specialisms.

“As financial advisers, they are always available and dependable, and I would not hesitate to recommend Chase de Vere to anyone.”

R, Kathane

Award-winning advice, tailored to individual needs

Independent recognition for the quality of our advice

- Our UK wide team of highly experienced advisers always strive to deliver the most personal and attentive service.
- This has been recognised by the industry and media with numerous awards and accolades.

- We were named as one of the Most Admired Companies by eprivateclient based upon the reputation of the company and the advice and service we provide to private clients.

- We were selected by a panel of financial journalists and industry experts in the Tax Planning Adviser of the Year category.

We are here for the long term

- For over 40 years we have been one of the country's leading independent financial advisers.
- Some clients have been with us for decades.
- That is because as well as offering high-calibre independent advice, we continually strive to make sure our clients are satisfied.

- We consistently work at delivering the right advice, in the right way and at the right time.
- And we manage our business and capital as prudently as we view our clients' finances.
- In this way, we will be around for many years to come.

We want our relationships to last a lifetime too

We focus on building lasting relationships with our clients. Many private clients last from one generation to the next, and we now advise the sons and daughters of many of our original clients. We have also worked closely with many businesses for decades, helping them through economic booms and hard times.

How is this possible? We have a comprehensive range of advisory services, designed with the longer term in mind, and an ability to accommodate changing requirements, as clients reach different life stages.



Get in touch

If you would like to find out more about Chase de Vere,
or want to speak to an independent financial adviser for
an initial discussion about your requirements:

please call us on 0345 609 2002
or send an email to info@chasedevere.co.uk

www.chasedevere.co.uk



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