Chase de Vere

Be *future* confident

"Today, my financial situation is stronger than ever. My investments have grown, my tax burden has decreased, and I feel more secure about my family's financial future."

At Chase de Vere, we enable you and your family to feel confident about your financial future, now and in the years to come, no matter what life throws at you.

Our mission, purpose, and commitment all converge towards one ultimate goal: Your financial confidence.

This isn't merely a promise, but the heart and soul of our private client services. We understand that 'confidence in the future' extends beyond the immediate horizon, and we believe that when you partner with us, your financial journey becomes our shared mission – to navigate together towards a secure future for you and your loved ones.

What does it mean to be future confident?

Being future confident is about more than just numbers. It's about having the assurance that your financial plans are robust and flexible, designed to evolve as your needs and circumstances change. It's more than just having your finances in good order today, it's about ensuring they're also working proficiently towards meeting your short, medium, and long-term objectives.

From starting a family to planning for retirement, buying a dream home, or leaving a legacy for the next generation, we work to ensure that you're not just prepared for what's coming but also confident about what the future holds.

Trustpilot **4.9** out of 5

Independence:
a cornerstone of our services

Independence is more than a business model at Chase de Vere; it is an integral part of our ethos and philosophy. It signifies our unwavering commitment to prioritise your best interests in every decision and recommendation we make.

To us, independence signifies freedom - the freedom to provide you with the most suitable solutions without being constrained by a limited set of products or tools.
It means we're not tied to any single financial institution or product provider. Instead, we have the entire financial market at our disposal, ensuring we can tailor our strategies to perfectly align with your needs, circumstances, and aspirations.

Tailored solutions, not pre-set answers

Each individual, each family, each story is unique and deserves a financial strategy that is equally unique. You are not a square peg, and we refuse to offer you a round hole. With Chase de Vere, you're not required to adapt to fit the solutions we provide. Instead, we adapt our solutions to meet your specific needs.

We take into account your dreams and goals, your lifestyle, your risk tolerance, and your financial circumstances to provide truly personalised financial advice.
Our advisers are committed to understanding your life journey, offering direction that is tailored to your specific path.

"With Chase de Vere, I never felt like I was being pushed towards specific products or solutions because of some hidden agenda or restriction. The advice I received was truly unbiased and centred on my sole needs and aspirations. I felt seen, heard, and valued."

What sets us apart: the Chase de Vere advantage

With a crowded marketplace of financial advisory firms, you may wonder, why choose Chase de Vere? We firmly believe that our approach sets us apart, offering a distinctive blend of independence, expertise, and commitment.

Your interests always come first

As one of the UK's premier independent financial advisory firms, we always put your interests first. We offer unbiased, unrestricted advice, and work attentively to ensure that your dreams and aspirations remain uncompromised. We take pride in our independence, which allows us to stay committed to what truly matters: You.

Unwavering commitment to Your financial future

We believe that investing in a secure financial future is invaluable, and our dedicated team of award-winning professionals commits their full expertise to secure the best outcomes for you. Our services go beyond simple advice; we partner with you to build a secure financial future.

Tailored financial strategies

We shape our financial strategies to be as individual as you are. Each plan is designed to optimise your resources, empowering you to make your situation work to your advantage.

Deeply personalised relationships

Our hallmark lies in the meaningful relationships we foster with our clients. We are not just your advisers; we are your trusted partners, prioritising your financial wellbeing as if it were our own.

A steadfast ally

With Chase de Vere, you have more than an adviser; you have a reliable ally that stands by your side, ready to provide assistance irrespective of life's unpredictable twists and turns.

Reliable support during adversity

In times of difficulty, you can count on us. We are your confidant, prepared to offer support and advice when you need it most.

"The suddenness of my husband's passing left me in a sea of emotional turmoil and financial confusion. Yet, the Chase de Vere team provided an oasis of calm amidst the storm. From the moment I reached out, they extended their support, treating me not just as a client, but as a friend in need."

Stress-free management

Trust Chase de Vere to expertly handle your finances, reducing the risk and stress of potential self-management errors. We deal with the complexities, freeing up your time to focus on what truly matters to you.

Exploration of unchartered financial opportunities

Our expertise could help you discover financial opportunities that might have otherwise slipped under your radar, potentially enhancing your financial prospects.

Transforming ambitions into reality

We do our utmost to make the unattainable, attainable. Our team is committed to helping you turn your financial aspirations into tangible realities.

Risk identification and mitigation

We thoroughly examine your financial situation, determined to identify and alleviate any concealed risks, potentially smoothing your path towards financial success.

Transparency and straight talk

We champion straightforward communication. Count on us for clear, rational, no-nonsense advice that presents the whole picture without sugar-coating, promoting absolute clarity and understanding.

Unparalleled visibility and control

We strive to ensure you have clear visibility, clarity, and control over your financial future, keeping you informed every step of the way.

Team of experts

Our advisers, along with an exceptional team of administrators, technical experts, and specialists, work in unison to safeguard your financial wellbeing. This collective approach provides an unparalleled level of service.

An enduring legacy

Founded in 1969, our enduring presence testifies to our commitment. As a trusted ally for many, we aim to extend this legacy to future generations, providing financial stability that spans across generations.

Backed by an industry leader

Working with Chase de Vere comes with the distinct benefit of our backing by Swiss Life, a leading European financial services provider with a significant 166-year history. This partnership grants you access to unparalleled experience, stability, and trust. As a client, you can enjoy increased confidence, knowing your finances are in the hands of a company backed by an industry leader committed to exceptional service, integrity, and excellence.

Our services:
delivering holistic financial solutions

At Chase de Vere, we offer an array of comprehensive services designed to support and enhance every aspect of your financial life. From securing your retirement to protecting your wealth, we're committed to delivering solutions that reflect your distinct needs and aspirations.

Pension savings

We provide expert advice to grow your pension savings, enabling you to capitalise on your current investments. Our aim is to help you build a prosperous future, where financial security is a given, not a luxury.

Financial protection

We understand the importance of protecting what matters most. That's why we offer tailored insurance solutions to shield you, your loved ones, and your financial health against unforeseen circumstances.

Investment strategies

Our investment strategies aim to safeguard your investments and manage risk efficiently. Our expert team is committed to fostering the growth of your wealth in a way that sustains its value over time, thereby safeguarding your financial future.

Home financing

Whether it's purchasing your dream home or climbing the property ladder, our team is dedicated to helping you. We provide advice and strategies designed to make living in your desired location a reality.

Tax optimisation

We believe in letting you keep more of your hard-earned money. That's why we provide effective tax strategies that maximise your savings, help you optimise your income and retain more of your wealth.

Retirement planning

We offer bespoke retirement planning services to help you achieve the lifestyle you desire once your working days are over. Our mission is to ensure you can enjoy your golden years on your terms, with peace of mind and financial security.

Estate planning

Our advice aims to help safeguard the financial future of your loved ones, both during your lifetime and afterwards. We specialise in thorough estate planning, which includes the early transfer of your assets as a living legacy. Our strategy is designed with the goal of enhancing your family's financial well-being now and in the future, offering you comfort and reassurance.

Long-term care funding

We understand the costs of quality long-term care can be substantial. Our experts are dedicated to helping you or your family members access the funds needed for this care, providing peace of mind for the future.

Professional collaboration

At Chase de Vere, we understand the complex nature of your financial life, which often calls for a more comprehensive approach. We collaborate with other seasoned and specialist professionals, including accountants, solicitors, and insurance brokers, to deliver well-rounded, holistic solutions tailored to you.

"Thanks to their advice, I was able to arrange my pensions in such a way that I could retire an entire year earlier than anticipated. This has given me the freedom to spend quality time with my family and pursue passions that I hadn't had the time for while working."

The value of your investments can go down as well as up, so you could get back less than you invested. Past performance is not a reliable indicator of future performance.

Supporting the financial journeys of your loved ones

Your financial journey isn't just about you — it's about your family and the generations to come. The legacy you leave behind, and the financial security of your children and grandchildren, are paramount to us.

Establishing the foundations

Our team can assist in laying the financial foundations for your future generations, whether that means helping set up trust funds, starting early with Junior ISAs, or providing advice on the most effective ways to contribute to their first home purchase.

Gifting and inheritance

To optimise your ability to provide financial gifts or inheritance to your loved ones, we provide advice on gifting strategies and inheritance tax planning. We help you understand the regulatory landscape and the most tax-efficient methods to pass on your wealth, ensuring your loved ones can benefit fully from your legacy.

Long-term planning

Our team is dedicated to long-term strategies that support your family's financial future. From helping you plan for your children's university expenses to providing advice on long-term care for elderly family members, our commitment spans the entirety of your family's financial journey.

Transitioning wealth

When the time comes to transition your wealth to the next generation, we're here to make the process as smooth as possible. Our expertise in estate planning ensures that your wealth is transitioned efficiently and in alignment with your wishes.

Supporting the financial health of your loved ones is not just about setting them up for success, but about ensuring the continuity of your legacy. With Chase de Vere, you can be confident that your family's future is in good hands.

How we work: a collaborative journey

Our working process at Chase de Vere is rooted in the importance we place on the relationships we foster with our clients. We believe that to offer you the best possible service, we need to understand you deeply and tailor our strategies to match your specific circumstances and aspirations.

01

Understanding you: The first step

We invest significant time in understanding you, your current situation, your dreams and ambitions, your family, and your vision of the future. This deep understanding forms the foundation upon which we build our advisory relationship. We recognise that each client is exceptional and deserves a bespoke service tailored to their needs and aspirations.

02

Crafting a comprehensive financial analysis

After gaining a holistic view of your financial circumstances and goals, our experts set to work crafting a comprehensive financial analysis, tailor-made to your particular situation. This strategy serves as your roadmap, enabling us to navigate the complexities of the financial landscape while keeping your goals at the forefront.

03

Empowering you with knowledge

Armed with a strategic and custom-made financial plan, you're equipped to make well-informed decisions about your financial future. However, you're not alone in this. Our experts are here to guide you through the implementation of your strategy, ensuring every step is clearly understood and seamlessly executed.

04

A constant ally

At Chase de Vere, our commitment goes beyond creating a financial strategy; we aim to be a constant presence throughout your financial journey. Life is dynamic and changes are inevitable. We understand this and ensure that your financial strategy can adapt accordingly.

Our ongoing service levels: tailored to meet your needs

At Chase de Vere, we appreciate that each of our clients has distinct needs, expectations, and ambitions.
That's why we offer three levels of ongoing service - Essentials, Primary, and Premier. Each is designed to provide varying levels of engagement, allowing us to align our services to your preferences and enquiries.

Essentials: The ad hoc partnership

Our Essentials service level is designed for clients who require sporadic assistance. While you may not have access to a dedicated adviser, you'll receive valuable updates on market trends and our services. And, when you need us, our team is just a phone call away, ready to provide the advice you need when you need it.

Primary: A consistent contact point

Moving up the ladder, our Primary service level provides a steady connection point for your financial enquiries. This service tier offers you a named adviser, accessible via phone when you need them. You'll receive regular updates on market developments that may impact you and periodic valuations of your holdings, keeping you abreast of your financial performance.

Premier: The pinnacle of our services

At the pinnacle of our service offering is Premier, a holistic, highly attentive service that gives you ongoing access to a dedicated adviser and their team. This isn't just about getting advice; it's about fostering the strongest form of a professional relationship, built on mutual trust, understanding, and an intimate knowledge of your financial journey.

With our Premier service, you don't just have an adviser; you have a partner, a confidant, a sounding board, and a translator of complex financial information. Our dedicated team is there for you, proactively bringing relevant information to your attention, and providing input when needed.

We are your unwavering ally, tuned into your needs, and thinking about your financial journey even when you aren't. We will proactively alert you when we believe it's time to take action, ensuring your finances remain optimised for your goals.

Each level of service at Chase de Vere is underpinned by our commitment to your financial success. Choose the level that suits you best and take the next step on your journey with confidence, knowing that we are with you every step of the way.

"I can't stress enough how much I value the regular communication with my financial adviser. They're always there, ensuring I'm on track, and keeping me informed. It makes a world of difference to my peace of mind!"

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How we work: a collaborative journey

Our ongoing services offer a comprehensive suite of features designed to guide, inform, and empower you in your financial journey.

Dedicated adviser & team access

Each client is assigned a specific financial adviser and client team. This facilitates personalised service, as your adviser gets to understand your financial situation, goals, and risk tolerance over time. It also ensures consistent communication and understanding of your unique financial situation.

Regular valuations & online access

We regularly assess the value of your investments to give you an accurate picture of your financial position. You have online access to these valuations, enabling instantaneous tracking and providing you with the flexibility to make decisions at your convenience.

Secure client portal

Our secure client portal allows you to interact directly with your adviser, access your records, and get copies of your valuations at any time. This fosters transparency, enhances security, and allows for efficient communication.

Formal reviews & interim check-ins

Annual formal review meetings offer a platform to discuss your investment performance, financial goals, and any changes in your financial circumstances. Additionally, interim check-ins provide opportunities to address any immediate concerns or adjustments required.

Simple withdrawals

We handle the withdrawal of funds from your Individual Savings Account (ISA), General Investment Account (GIA), or Bond wrapper. As long as the withdrawal doesn't necessitate financial advice or trigger a rebalancing of your portfolio. This feature provides you the convenience of easy withdrawals while preserving your investment strategy.

Fund transfers

With your agreement, we facilitate the transfer of funds between your GIA and ISA for maximum tax efficiency, provided there is no change to the underlying investments. This helps you optimize your investment returns while minimizing tax liabilities.

Financial adjustments

We will modify your income levels from investments and make adjustments to regular premium payments. However, these modifications will only be made within the scope of your existing financial advice. This gives you the freedom to adapt your financial approach according to your evolving needs.

Investment alerts

We proactively monitor the performance of your investments and alert you if we identify any concerns regarding their quality or performance. This ensures that potential risks are identified early, keeping your financial plan on track.

Paperwork management

We handle all the paperwork, decipher complex financial statements, and assist with form submissions. This hands-on approach eliminates the stress of paperwork, affords you clarity about your financial situation, and ensures that your forms are accurate and timely, providing peace of mind and enabling smarter decision-making.

Liaising with other parties

Beyond the paperwork, we act as your financial mediator.
We coordinate with product providers, family members, trustees, executors, beneficiaries, and professional advisers like accountants and solicitors, as required. This not only saves you precious time but also enhances your overall financial strategy by uniting all parties towards your financial objectives.

Financial news & updates

We provide updates on financial news, market trends, regulatory changes, and economic indicators. This ensures you are well-informed about the factors that may impact your finances, helping you make informed decisions.

Budget summaries

We summarise the key points from the Chancellor's Budget statement to highlight any potential effects on your financial strategy. This saves you time and effort in digesting complex fiscal information.

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Service features included at each level of ongoing service

Features	Essentials	Primary	Premier
Dedicated adviser & team access	Not included	Included	Included
Regular valuations & online access	Included	Included	Included
Secure client portal	Included	Included	Included
Formal reviews & interim check-ins	Not included	Not included	Included
Simple withdrawals	Not included	Not included	Included
Fund transfers	Not included	Not included	Included
Financial adjustments	Not included	Not included	Included
Investment alerts	Not included	Included	Included
Paperwork management	Not included	Not included	Included
Liaising with other parties	Not included	Not included	Included
Financial news & updates	Included	Included	Included
Budget summaries	Included	Included	Included

Get in touch: start your financial journey with us

At Chase de Vere, we believe in starting our relationship with a conversation. Your financial journey is unique, and we are committed to understanding your aspirations, challenges, and circumstances to offer you the best service possible.

Book an initial consultation

We are happy to arrange a face-to-face meeting, a video call, or a teleconference at your convenience. Please contact us to schedule an appointment. This consultation is a no-obligation opportunity to discover how Chase de Vere can assist you in securing your financial future.

You can contact us via phone or email:

Telephone: 0345 609 2002
Email: enquiries@chasedevere.co.uk

Alternatively, fill out the contact form on our website, and a member of our team will get in touch with you. Scan the QR code or visit: **chasedevere.co.uk/contact**

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