



corporate
clients



welcome

Fraser Heath was established in March 2002 following a management buy-out, but the company's history dates back more than 20 years. Our aim is to provide a personal and professional service. We want to create an environment that allows us to look after our clients by sticking to our own core values.

At Fraser Heath we have a wealth of experience within our friendly and approachable team. Our advisers work in conjunction with our paraplanning and administrative support teams in a way that differentiates us from our peers. We focus our efforts as a team to ensure that we deliver the service expected of us.

our core values:

- Being truly Independent - looking at our clients' financial needs and providing the best solution for them from the whole of the market without bias.
- Building Long Term Relationships – We have achieved success by building long term relationships with clients, who have then had the confidence to recommend us to others.
- Professional Expertise - We have developed a practice approach, which means our advisers are not only good general practitioners but each have particular areas of expertise. This team approach means that whatever your financial problem, we can find a solution.
- Service - We can only build long term relationships by delivering on service. We pride ourselves on regularly reviewing your financial plans and helping you resolve financial problems as they arise. We will draft a service agreement with you which details how we will work together to keep your finances on track.



As a Corporate Client we can help you:

- Understand your legislative obligations and costs involved with regard to providing employee benefits
- Review your existing employee benefits package in order to get the best possible deal
- Communicate your offering to staff to ensure it is valued
- Provide advice to your workforce on appropriate savings to meet their retirement needs
- Ensure the business is kept up to date with relevant legislation and remains compliant with The Pensions Regulator
- Ensure your company assets and profitability can be maintained if the worse happens

how we do it

We assist employers with the delivery of advice to their staff so that it is valued as an employee benefit. This has the effect of increasing staff satisfaction and retention. This can also improve the efficiency of the workforce while at the same time reducing any costs to the business in replacing staff.

We have built excellent relationships with our existing Corporate Clients who range from small owner managed business to large companies with multi- million pound turnover.

Our dedicated Corporate Administrative Team work alongside our advisers to provide a professional and friendly service.

The clients we work with:

Our clients include various types of businesses who in the main have a common belief – a happy, engaged workforce is a productive and efficient workforce. Our corporate clients understand the value in offering a tax efficient employee benefit package as well as access to independent advice for their staff.

We meet regularly with our corporate clients to discuss industry or personal changes and plan for any impact on their financial resources. Our clients also trust us to communicate with their staff to ensure that the employee benefits package is truly valued. In turn this helps us to secure the financial futures of their employees.



If you would like to understand more about how working with a forward thinking, independent financial advice business could benefit your firm please get in touch.

We look forward to speaking with you.



Fraser Heath Financial Management Ltd
Helping you face the future with knowledge and confidence.

Visit our website or call us today for more information.

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