Jerroms

Part of the SUMER Group

JERROMS FINANCIAL PLANNING INVESTMENT, WEALTH AND PENSION ADVICE

At Jerroms Financial Planning we focus on helping our clients make informed financial decisions.

Whether you are a business owner, trustee, entrepreneur, high earner or family nearing retirement, we're here to guide you in managing your finances effectively and planning for the future.

As an independent financial advisory firm authorised and regulated by the Financial Conduct Authority (FCA), we create forward-thinking financial plans that meet your individual needs.

OUR EXPERTISE

Specialist Services

Property Purchase/Loans through Pensions
Facilitate tax-efficient business property purchases via Self-Invested Personal Pensions (SIPP) or Small Self-Administered Schemes (SSAS). Whether financed independently or with borrowing, this strategy offers an excellent opportunity to recapitalise your business. Leverage your pension scheme to fund key capital projects and drive growth efficiently.

Business Continuity Planning
Develop tailored insurance solutions to mitigate risks, including key person and co-shareholder protection.

Lifetime Cashflow Modelling
Enables clients to visualise their financial future, fostering confidence and informed decision-making.

WE ARE FULLY INDEPENDENT AND DIRECTLY AUTHORISED BY THE FCA!

Our services are designed to integrate seamlessly into your broader financial goals, covering:

Investment and Tax Advice
Helping clients plan for retirement or business exits by determining "how much is enough" and using tax-efficient strategies to create growth and income.

Protection Advice
Safeguarding family wealth and business continuity through comprehensive strategies, including key person insurance, co-shareholder protection, and family protection policies.

Pension Planning
Structuring and managing tailored retirement strategies for individuals and directors, while reducing corporation tax liabilities through company pension planning.

Inheritance Tax Planning
Providing a comprehensive approach to managing future liabilities through spending, gifting, insuring (Whole of Life policies), investments, and trusts.

Why Choose Jerroms Financial Planning?

- We are completely committed to offering expert Independent financial advice, in a very understandable way. We encourage our clients to ask as many questions as they need to, so they have a clear understanding of what's been agreed to and why.

- We work closely with our clients to agree suitable objectives, making sure all their needs are being met. And we are continually reviewing the financial performance of the investments, making changes where needed, to stay on track.

- We work closely with providers to ensure we offer our clients the most competitive contracts and charges available in the marketplace.

> “We understand that financial planning is not just about numbers; it's about your future and peace of mind. Our team is dedicated to providing personalised advice tailored to your personal needs and goals. By choosing our services, you gain access to expert guidance, comprehensive strategies, and a commitment to helping you achieve financial security and success. Let us help you navigate your financial journey with confidence and clarity.”
>
> **Gordon Symes, Managing Director**
> **Jerroms Financial Planning**

JERROMS FINANCIAL PLANNING KNOWLEDGE

Whether you're looking to set up your very first pension, require a review of your existing arrangements or want to determine the most efficient way to draw income from investment – our team of financial planners will make sure you receive the best investment advice, with extremely competitive products, to maximise your returns and minimise your tax liabilities.

GET IN TOUCH

Our friendly team of expert advisers are on hand for a confidential, no-obligation chat to see how we can help and support you with your specific requirements.

Gordon Symes
Managing Director
Independent Financial Adviser
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Advising clients for nearly 25 years.

Jamie Ellis
Independent Financial Adviser
Jamie@jerromsfp.co.uk

Working within financial services for 12 years. Rated ‘Citywire Top 35 Under 35 Advisers’ in both 2023 & 2024.

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