

# MILLION *plus* FINANCIAL PLANNING



## About Us

MillionPlus Financial Planning advises and supports entrepreneurs, professionals and those requiring more complex planning with comprehensive financial solutions for their individual, family and business needs.

Just as no two individuals or businesses are the same, our advice and solutions are bespoke, personalised and always based on fitting in with your overall plan in life.

## Services

MillionPlus Financial Planning's wide range of expertise covers:

- Strategic financial planning – establishing the big picture
- Wealth maintenance, management and creation
- Retirement solutions
- Protecting you and your family's wealth
- Tax efficient and effective planning
- Bespoke project work across many professional disciplines

As you would expect we integrate our advice by consulting and working closely with professional partners and advisers, whether linked to you already or introduced by ourselves. These can include:

- Tax specialists
- Accountants
- Solicitors
- Banks and finance providers

## Chartered Financial Planning

What marks us out as different is that MillionPlus Financial Planning has a team of Chartered Financial Planners, whose status is a mark of excellence. Introduced in 2006, 'Chartered Financial Planner' is an objective measurement and verification of a professional approach to meeting clients' needs. It considerably exceeds the new standards being introduced by the Financial Conduct Authority.

## Ownership

MillionPlus Financial Planning is majority owned by Largemortgageloans.com Limited, founded, owned and managed by Paul Welch and backed by three leading UK-based entrepreneurs; Jon Moulton, chairman of private equity firm, Better Capital, Neil Redcliffe, group managing director of Currencies Direct and Alan Burgess, managing director of Masterframe Windows and board member of FENSA, the GGF and BFRC.

Jon Moulton has introduced Eric Cater, chairman of Hood Group Ltd, who has been appointed chairman of Largemortgageloans.com Limited and has also personally made an investment in the company.

## Advisers

MillionPlus Financial Planning's fully qualified professionals are available for you to consult via telephone, email and face to face. We offer, in keeping with other professions, an initial meeting which is free of charge.

Our consultants will draw on their considerable industry experience to ensure that the advice you receive meets your individual needs and is the right solution for you.

## Contact

Contact us now to discuss your financial planning requirements.

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The Financial Conduct Authority does not regulate tax advice and offshore investment.

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