

skerritts
WEALTH MANAGEMENT





Skerritts Wealth Management is designed to take the worry from the shoulders of investors who have a portfolio of investments. Using the very best research material offered by the market, we will actively manage your holdings and offer you either an advisory or a full discretionary service, according to your requirements.

With our Discretionary Service, you will leave any future investment decisions in the hands of your adviser. You will agree your investment objectives with him, and once he is fully informed as to your personal and financial circumstances, an appropriate investment strategy will be agreed with you, which will be monitored and amended on a regular basis.

You can contact your adviser at any time to discuss matters, and will be sent half-yearly valuations and statements. There are also many add-on services available, such as the provision of annual consolidated tax certificates and capital gains tax statements to assist you with your tax affairs.



“ Skerritts Wealth Management is designed for clients who have substantial assets and who require a professional service from experienced and highly qualified relationship managers. Our service can be offered on both an Advisory and Discretionary basis, depending upon the individual’s requirements. ”

What is Wealth Management?

Wealth Management is financial planning for “high net worth” individuals and families, with the aim of growing and sustaining long-term wealth. This can be achieved by providing a range of services and advice which could include the following:

Investment Management

Trust Management

Pensions

Inheritance Tax Planning

The Wealth Management Team



Richard Skerritt

Managing Director

Richard has built Skerritt Consultants into one of the most successful financial services companies in the South East. Voted previously by a national newspaper as "IFA of the Year", Richard writes regular columns in numerous national financial magazines and newspapers.

Specialising in Pension Advice, Richard can cover the entire spectrum of this very complex area.

He is very keen that the Company should contribute to the well-being of the Environment and works within the local community on many charitable projects.

Andrew Merricks

Head of Investments

Andrew often writes for the financial press and is quoted in the investment section of publications such as the Sunday Telegraph and the Observer. He writes a monthly column for "What Investment" magazine and regularly sits on investment panels and speaks at conferences and seminars. He has appeared in the list of "Top 50 Most Influential IFAs" for the past two years.

Andrew has been an Independent Financial Adviser for many years, choosing to specialise in investments whilst a Partner at his previous firm. He subsequently joined Skerritts as Head of Investments in 2004.



Mark Waters

Investment Manager

Mark has been an Independent Financial Adviser since 1991, and is a Chartered Financial Planner. He has considerable experience in all aspects of financial planning and this, together with his investment management qualification and skills, allow him to take a holistic view of client requirements when giving advice.





“ Wealth Management is a trading style of Skerritt
Consultants Limited, which has been providing sound
financial advice for over 15 years. ”





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