Introducing Infinite Wealth Management Ltd

Welcome to Infinite Wealth Management Ltd. We aim to become your trusted advisers in managing your wealth. Our philosophy as Directors of IWM Ltd is to offer our clients expert advice of distinct quality, integrity and finesse. This in turn will provide "peace of mind". We want to ensure that we maintain a long and trusting relationship through honesty, simplicity and a continued drive for wealth creation, preservation and protection.

Introducing our Directors

Adrian Watts has been in financial services since 1972 with such companies as Abbey Life, J Rothchild Assurance who became St. James's Place Wealth Management Group. Adrian has a wide range of experience and knowledge developed over many years to help people, both individually and in business, to fulfil their aims and aspirations as well as offer that all important reassurance for your financial future.

Adrian offers a seamless service of distinct quality, professionalism and expertise covering varying aspects of wealth management, in particular retirement planning.

Stuart Brown has been in financial services since 1996 with such companies as Barclays, Coutts and St. James's Place. Stuart's knowledge and experience has been based around the provision of face to face advice on protection, pensions, investments and inheritance tax planning to both business owners and personal clients alike.

Stuart often gets involved in the more technical areas such as Inheritance Tax Planning, Pension Transfers and Investment Replacements. We do not provide any advice on Occupational Pension Scheme Transfers.

Our Philosophy

Below is a list of the core values of our Practice which are embedded in the way Infinite Wealth Management Ltd deals with all our clients:

- To act professionally with integrity and honesty at all times
- To deliver a prompt, accurate and courteous service to all clients
- To provide a client centred approach, focused on their needs and goals
- To return all client phone calls and emails within 1 working day
- To acknowledge correspondence and communicate with clients regularly regarding ongoing actions
- To offer bespoke solutions in a tax efficient way

TCF - Treating Customers Fairly

Treating Customers Fairly is a core principle of our company and the way we conduct our business. We are constantly striving to improve our service and develop new and innovative ways to communicate our services and new product information to you.

Central to our Treating Customers Fairly ethos is our commitment to providing clear and concise information, free of "jargon" and written in plain English.

These are the key factors which determine our policy of Treating Customers Fairly

1. You can be confident that you are dealing with a firm which holds the fair treatment of our customers as central to our corporate culture.
2. Products and services marketed and sold in the retail market are designed to meet the individual needs of our customers.
3. Our customers are provided with clear information and are kept appropriately informed before, during and after the point of sale.

4. Where we offer advice to our customers, the advice is suitable and takes account of their individual circumstances.
5. Customers are provided with products that perform as we have led you to expect, and that the associated service is of an acceptable standard, and is as you have been led to expect.
6. Customers will not face unreasonable post-sale barriers imposed to change products, switch providers, submit a claim or make a complaint.
7. We will ensure that any complaints or grievances are handled in a sympathetic, positive and professional manner.

Feedback

Your feedback is important to us. We want to know whether your experience of us lives up to your expectations. If you have any feedback, good or bad, let us know, because your views are vital to helping us improve our service to you in the future. To send us your feedback, please email info@infinitewm.co.uk or call us on
01206 820179 or 01206 262998.

Infinite Wealth Management Ltd is an appointed representative of Forum Financial Services Ltd. Forum Financial Services Ltd is entered on the FSA register (www.fsa.gov.uk/register/) under reference 302408 The Financial Services Authority does not regulate National Savings products, Buy to Let mortgages, commercial mortgages, tax planning, inheritance tax planning and offshore funds.

The information contained within this website is subject to the UK regulatory regime and is therefore primarily targeted at consumers based in the UK.