



How can a adviser help you

Gale and Phillipson is an independent whole-of-market financial planning and investment management firm, offering services to personal, corporate and trustee clients.

Our financial planning and investment management services can help to reduce your risk, increase your return, reduce your costs, reduce your tax and save on your administration.

Getting the right investments for you

Making the right decisions when it comes to investments is critical in maximizing your returns. An adviser will create a portfolio that incorporates your life goals and assess your attitude to risk. A mix of shares, bonds and other investments will be evaluated to create a diverse portfolio that suits your life goals.

Keeping your portfolio up to date

Investments are constantly changing over time. Your adviser will evaluate and continually reassess your portfolio to ensure it is fully aligned to your goal and getting the best return.

Help to buy a home

Purchasing a home is one of the biggest financial decisions we make in our lives. With so many lenders to choose from, you want the most suitable mortgage or re mortgage deal no matter your buying circumstance. Our mortgage service is simple and straightforward saving you valuable time and money.

Help to plan for retirement

Planning for retirement can be very complex and there are many options for pensions on the market. One of our advisers will work with you to understand your pre and post retirement goals. They will also discuss the age you wish to retire and the flexibility of income you need in retirement. An adviser will use their wide-ranging and specialist knowledge of retirement planning, annuity products and a variety of research tools to make a sound personal planning recommendation.

Protecting your loved ones

Searching for insurance can be confusing and time consuming. Especially with lots of companies advertising different insurance options. Our advisers will ensure you get the right insurance for you and your family. This advice will safeguard your finances if the worst was to happen.

Feel more secure with your money

Building assets is the key to feeling secure about your money. The first course of action is to make saving a habit. From here an adviser can direct you on how to make these savings build the most amount of wealth efficiently.

Saving you time to do the things you love

Researching all options that are available can take a significant amount of time and work to carry out. Our adviser will do all of this for you, and you will only need to do the minimal amount of paperwork. This will give you more time to do the things you love and allow you to enjoy life to the fullest.

Your own personal adviser

Our advisers will ensure that you take all the necessary steps to reach your long term financial goals. They will research all the options available on the market and advise you on the best option's that suits your goals and requirements. They also have access to exclusive products that aren't available directly from providers.

Help you to save money

Our financial advisers will always consider tax position to ensure your savings are as tax efficient as possible. This could be through the usage of Independent Savings Accounts (ISA's) or pension plans that offer the best government incentives. There are many options available to save on tax, even for complicated situations.