

A new  
wealth management  
**partner**  
for your clients



# Bespoke relationships

and rigorous processes

Canaccord Genuity Wealth Management (CGWM), one of the UK's top ten independent wealth managers, has recently relocated to a state-of-the-art new office in Llandudno.

This means we are now perfectly placed to work in partnership with you to support your clients' wealth management needs. From our base in North Wales we offer extensive local expertise, the stability of a combined Group with more than 26,000 clients, and a rigorous, trustworthy investment process based on high-end research capabilities. Our presence in the area dates back to 1948 (formerly under Hargreave Hale).

We are committed to building strong, mutually beneficial working relationships with our intermediary partners. We will create a bespoke service to suit your working style and meet your clients' needs.

## Our services

**Estate and probate service** – for probate purposes we can value a deceased's investment assets as at the date of death. After that, if the beneficiaries wish, we can provide a dealing and stockbroking service to liquidate some or all of the investments, and help them with financial planning and investment management advice.

**Investment management\*** – we offer execution-only and advisory stockbroking, plus discretionary portfolio investment management. We can also help if you are setting up a trust for a client who wants to outsource the investment management on a discretionary basis.

**Financial planning\*\*** – including inheritance tax, retirement and care homes planning. We'll carry out a full financial review to ensure a client's arrangements are on track to create the future they want. And we'll put solutions in place to help take full advantage of all available tax efficiencies and savings.

## Our North Wales team

### **Matthew Rainbird**

As Head of the Llandudno office, Matthew is responsible for the team servicing North Wales and Cheshire. A Chartered Fellow of the Chartered Institute for Securities & Investment, Matthew constructs diversified, multi-asset portfolios to deliver clients' goals.

### **Andrew Moffat**

Having worked for 30 years in investment markets, Andrew has extensive experience of discretionary asset management and effective asset allocation. He is responsible for managing diversified portfolios for private clients, trusts and institutional clients.

### **Aled Jones**

A bilingual member of the team, Aled manages direct equity and fund-based portfolios on a discretionary and advisory basis for private and intermediary clients. He is a Chartered Fellow of the Chartered Institute for Securities & Investment.

### **Sagar Morjaria**

Sagar is the team's financial planning\*\* specialist. He is an experienced and highly qualified Wealth Adviser, holding the Chartered Financial Planner qualification and is a Fellow of the Personal Finance Society.

\* This service is deemed to be 'restricted' as we do not provide advice in respect of your clients' pension, mortgage, loans or life insurance products.

\*\* This service is 'independent' and fee based which means your Financial Planner isn't tied to any specific provider or products. This service is provided by Canaccord Genuity Financial Planning Limited (CGFPL).

# How can we help?

If you'd like to know more about how we can help with your clients' wealth management needs, get in touch. We'll be delighted to answer your questions, provide more details of our services, and show you round our new office.

**Call Matthew Rainbird on 01492 558 359**

**Email [matthew.rainbird@canaccord.com](mailto:matthew.rainbird@canaccord.com)**

**Canaccord Genuity Wealth Management**

**Anson House, 1 Cae'r Llyn, Llandudno Junction, Conwy LL31 9LS.**

## **Important information**

Investment involves risk. The value of investments and the income from them can go down as well as up and you may not get back the amount originally invested. The investments discussed in this document may not be suitable for all investors. Investors should make their own investment decisions based upon their own financial objectives and financial resources and, if in any doubt, should seek advice from an investment adviser.

The tax treatment of all investments depends upon individual circumstances and the levels and basis of taxation may change in the future. Investors should discuss their financial arrangements with their own tax adviser before investing.

Canaccord Genuity Wealth Management (CGWM) is the trading name of Canaccord Genuity Financial Planning Limited (CGFPL) and Hargreave Hale Limited (HHL). They are both wholly owned subsidiaries of Canaccord Genuity Group Inc.

CGFPL and HHL are authorised and regulated by the Financial Conduct Authority (registered numbers 154608 and 209741).

CGFPL has its registered office at 41 Lothbury, London, EC2R 7AE.

HHL has its registered office at Talisman House, Boardmans Way, Blackpool, FY4 5FY.

CGFPL and HHL are registered in England & Wales no. 03739694 and 03146580.

Canaccord Genuity Wealth Management does not make any warranties, express or implied that the products, securities or services mentioned are available in your jurisdiction. Accordingly, if it is prohibited to advertise or make the products, securities or services available in your jurisdiction, or to you (by reason of nationality, residence or otherwise) such products, securities or services are not directed at you.

The products and services offered by CGWM in the UK may differ from those offered by other Canaccord Genuity Group Inc. offices.

**CANACCORD** | Genuity  
Wealth Management