

## ADVERTISING FEATURE

# Financial planners in town celebrate 25th anniversary

## Keeping client finances on track to meet their lifestyle aims

THE financial world has seen dramatic changes in the last 25 years, but the need for honest and impartial advice to make the right decisions for our future is as important as ever.

No-one knows that better than the team at Brian Mellor Financial Services Ltd, which is celebrating its 25th anniversary.

From humble beginnings in a rented office, the practice established its base in Russell Street, Leek before moving to its current offices at Russell House, 20 Stockwell Street in 2003.

Now encompassing six qualified and experienced financial planners, a mortgage consultant and a busy administrative team, Brian Mellor Financial Services has certainly moved with the times, today offering a service that focuses on lifestyle planning as much as interest rates and investment returns.

With a significant client base that has grown almost entirely through personal recommendation, the practice is rooted in the community of the Moorlands and is proud of an 'open door' policy that means they are happy to deal with any client enquiries.

"We have a fantastic team here at our town centre office. It's convenient for clients to call in and we're always ready to answer queries by email and calls," said Brian.

Although he plays a central role as a financial planner and head of the practice, Brian emphasised that it's very much a team effort.

"We have a culture of co-operation and integration which means that all members of the professional team support each other in maintaining

service levels. If a client has a specific query there will always be someone available to advise them," he said.

Central to the practice's approach is to identify what clients are trying to achieve, either in their working, business and family lives, or in their plans for leisure and retirement.

"We take a holistic approach to financial planning," said Brian. "It's all about helping our clients focus on what they really want to do - that could be anything from supporting dependants when buying a new home or going on a luxury holiday - and then ensuring they have the finances in place to achieve that."

To help clients identify their objectives and how they can realistically achieve them, Brian Mellor Financial Services have taken a lead by introducing the latest Cash-Flow Modelling software. This helps identify goals that require planning, money or time to achieve and maps out a "life plan" to ensure these goals can be met. It shows clients' their income, investments and pensions for years to come, giving a clear picture of what finances are available to support their lifestyle choices.

"Many of our clients have saved carefully for years. We help them not only to achieve the best return on their investments but to make best use of the money that's available to them, particularly as they step back from employment. With services like Cash-Flow Modelling we ensure that clients' financial and life planning requirements remain on track."

Supporting its commitment to "turning your dreams into reality" is

the firm's constant research into the performance of investment products and close working relationship with blue chip financial institutions that gives an in-depth understanding of changes in the finance markets.

The biggest change in recent years came in 2015 with the introduction of pensions freedom giving the public many more options when it's time to

access their pension funds. Pensions freedom has opened lots of new and rewarding possibilities, but it's also never been more important to receive expert guidance," said Brian. "For our clients, some of whom have been with us for most of the last quarter century, we aim to see them happy and financially secure for many years to come."

## Supporting community

AS WELL as serving a local client base, Brian Mellor Financial Services like to put something back into its local community.

Team members recently completed a 20-mile Peak District walk to support three local good causes - Horton Lodge Community Special School, Moorlands Dog Rescue and Wheelies, a sports and activity club for the physically disabled. The sponsored walk, which is the third they have held, raised in excess of £3,000.

The practice is also an active supporter of the town's football, cricket and rugby clubs.



The team at Brian Mellor Financial Services Ltd.

*We've got something to celebrate...*



For 25 years we've been dedicated to offering the best possible advice, service and support to our clients in the local community.

We focus on people not products, helping shape your financial plans to fit your lifestyle choices.

So whatever your aims in life, we'll help keep your finances on track so that you can achieve them.



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