



## Case Study

International property advisors GVA Grimley had long recognized the benefit of giving personal financial planning advice to their senior team. In order to improve the benefit already given to equity partners it was decided to employ the proactive solutions offered by clarity. The company wanted to help senior partners whose complex tax and personal pensions issues might otherwise cause concern whilst at work.

GVA Grimley chose, in particular, the clarityONE-TO-ONE service because of the fully comprehensive, proactive annual review service. This service of advice includes a one-to-one meeting, annual valuation, newsletters, e-mail alerts and access to a dedicated website within the clarity web offering. This web support incorporates a series of calculators for mortgages, investments and pensions and a full research facility. There is also a transaction service for ISA, PEP transfers and Unit Trusts (including OEICs), which is offered at nil initial commission and with heavy further discounts to initial charges. Partners also have year-round access to advisors by telephone and all application forms are completed on their behalf. Highly qualified clarity advisors meet with partners at their own workplace, in any of the company's offices located around the UK.

All this combines to make a win-win situation. Partners can approach their work safe in the knowledge that their financial affairs are both in order and under regular review. Claire Brooks of clarity said, "Partners experience a wide range of financial issues particularly concerning tax and their individual pensions. Our advice helps remove the need for individuals attending to their affairs during working time. Everyone works better when they are focused on the job at hand."

Stephen Westacott, Director of Human Resources at GVA concurs: "Our equity partners are, of course, very valuable to our business and they have particular tax, investment and pensions issues to deal with. clarity's proactive fee-based service is exactly the solution we were looking for."