



CHAMPAIN

FINANCIAL SERVICES

WELCOME TO CHAMPAIN

Planning a comfortable financial future takes time and setting your objectives is the first step to success. Having clear objectives gives focus and direction.

We are financial planners, our biggest priority is you.

Champain has been established since 2003 and operates from offices in the South East and Central regions. The advice we provide is completely independent and impartial. Ongoing monitoring and research enables us to recommend the most appropriate solutions to meet your objectives.

“

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”





OUR SERVICES

Taking financial advice can be a daunting process, whether for the first time or if you have taken advice in the past. Finances often take a low priority for many people because they can be complex. At Champain clients appreciate our ability to make the process simple, understandable and positive.

We make sure we take the time to understand your needs and objectives before we make any recommendations.

You are at the centre of everything we do.

Why use Champain?

INDEPENDENT

We have access to the whole market and deliver an independent, unbiased and ethical advice service.

QUALITY

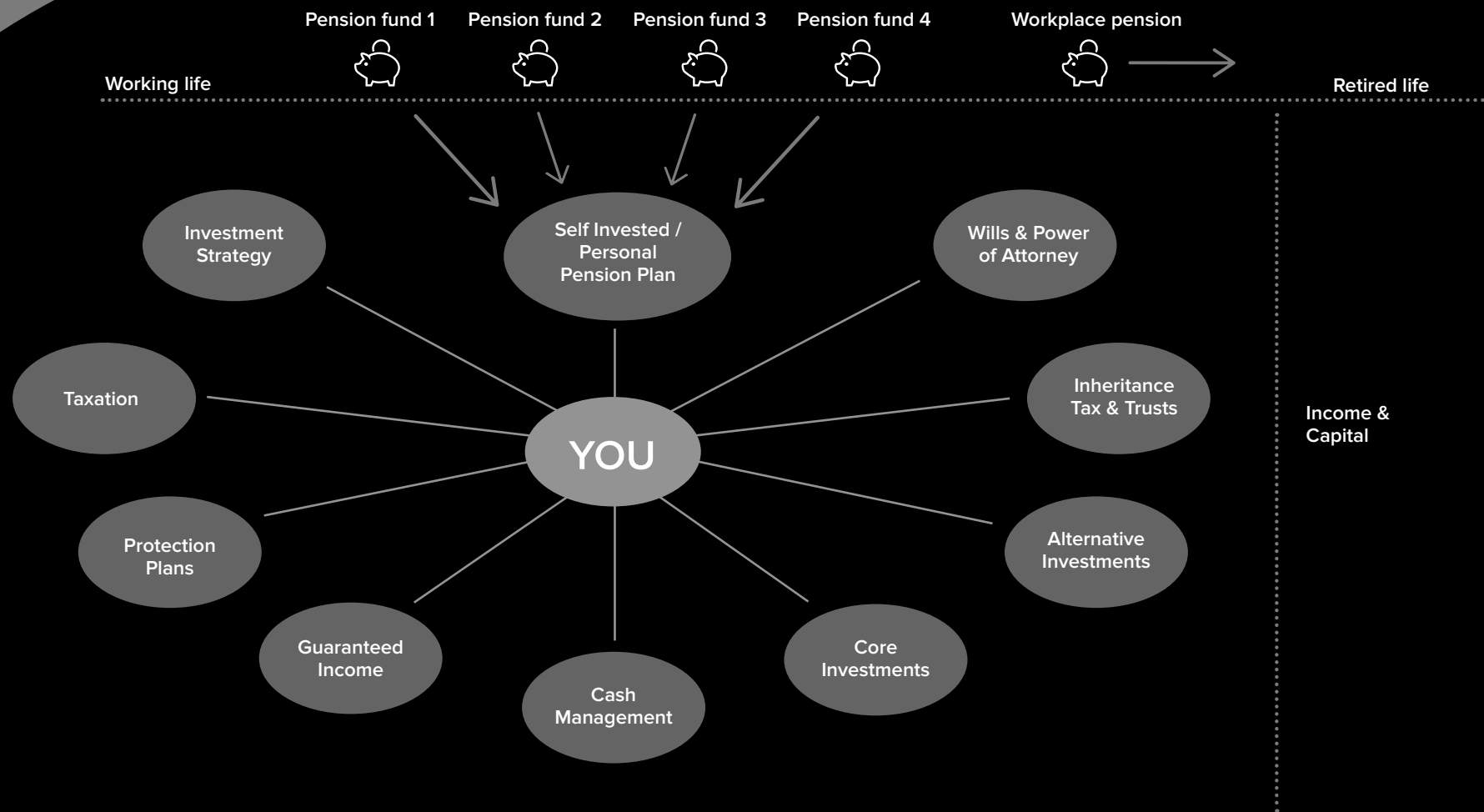
We do business in a way and at a time that suits you.

TRUST

You will be supported by Champain staff from the outset, who will deliver a high quality and personal service.

EXPERIENCE

We listen to your needs and use our experience to find you the best solutions.



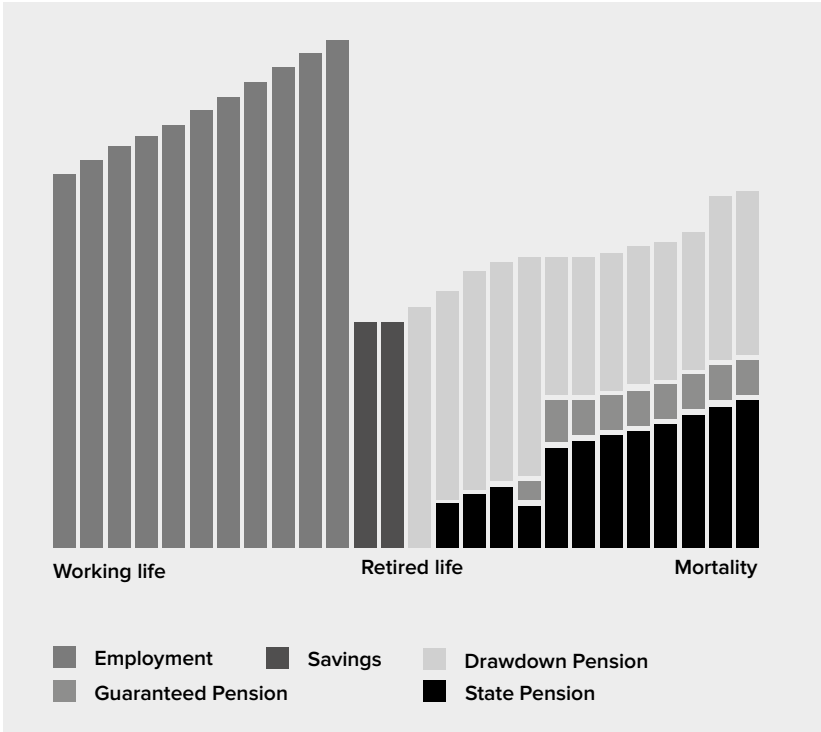
FOUNDATION

Initially we establish your present situation, appetite for risk and your objectives; this will then lead to recommendations and the implementation of your financial plan.

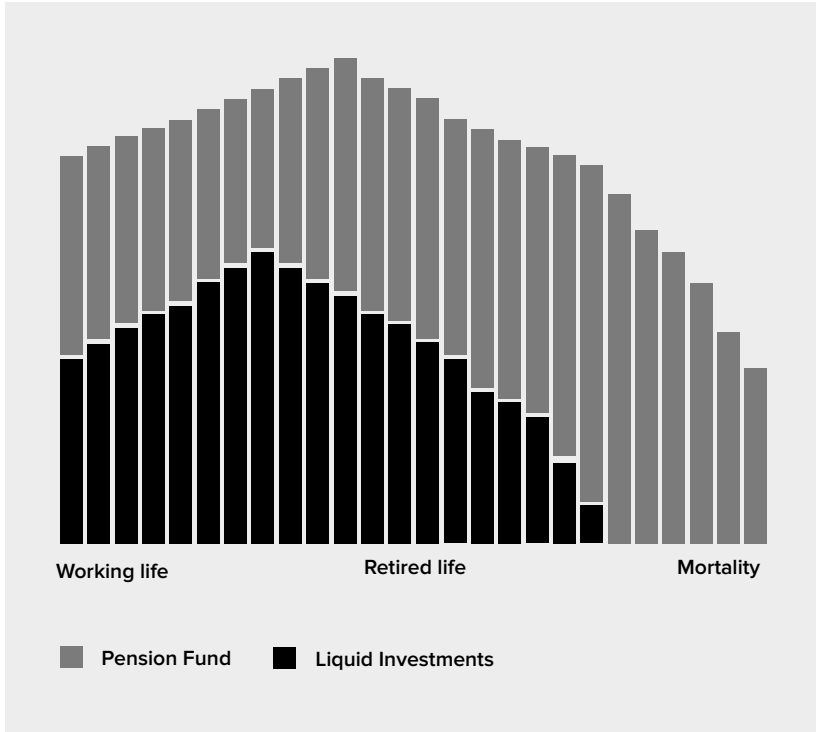
Journey into consolidation

If you have accumulated numerous workplace pensions over the years from different employers, it can be difficult to keep track of how they are performing. At Champain, our pension consolidation service allows us to review these individual plans to determine if it is best advice to consolidate in one place, ensuring they are managed correctly and in line with your objectives.

Cash Flow - Income

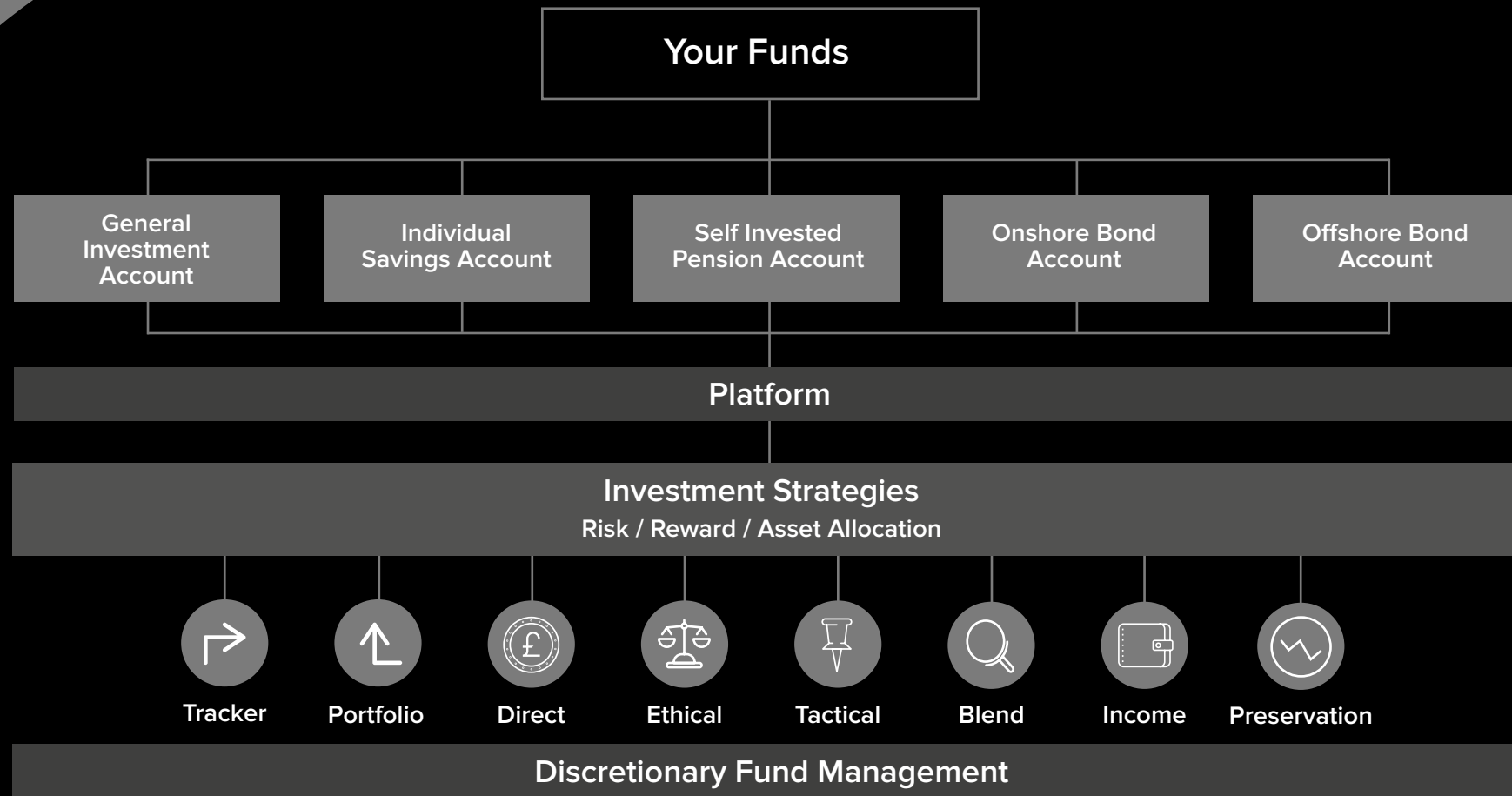


Asset Flow - Capital



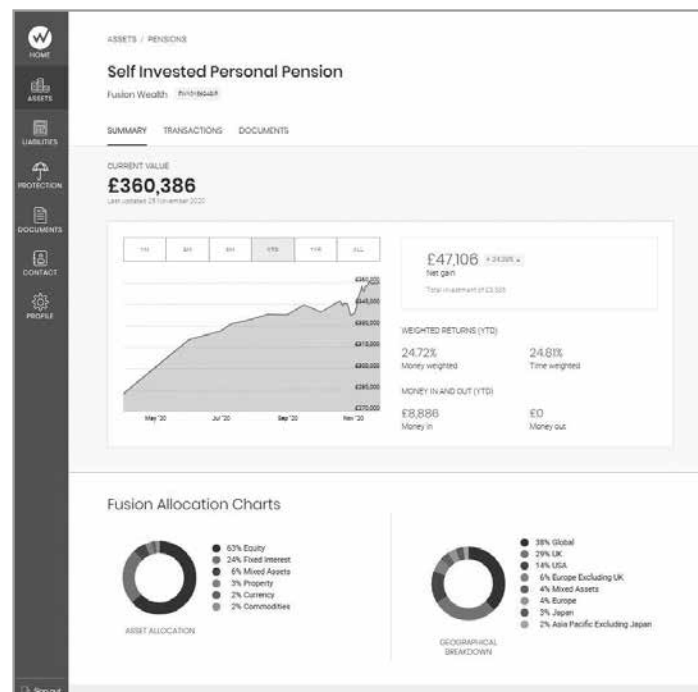
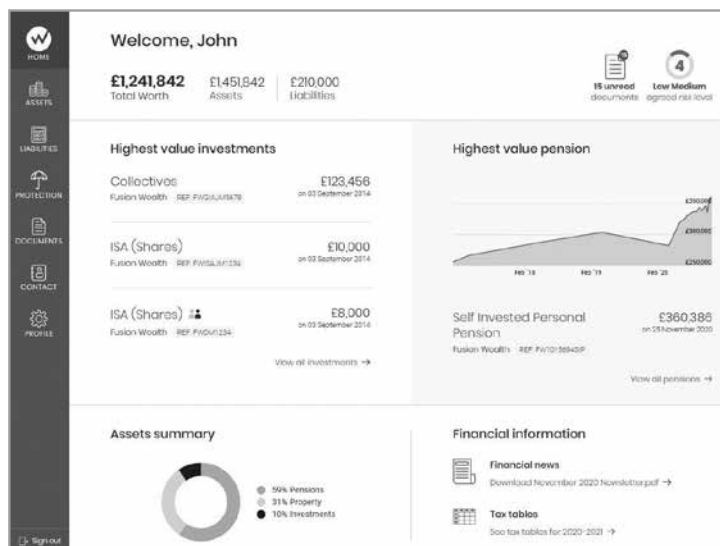
FINANCIAL PLAN

It is important to set and review financial objectives. A long-term financial plan will help you reach your long-term objectives and gives you focus for your short-term needs. It can help you stop making financial decisions based on fear and help you determine the order of your major life steps. This plan will vary from individual to individual and at Champain we will support you to implement your financial plan.



INVESTMENT JOURNEY

There are a number of risk-based portfolios that we deliver for our clients, providing variety and value for all possible situations. All are put together following a strong and deliberate process and contain in the region of 10 – 20 funds in each.



ONGOING SERVICE

It is vital to manage funds and your financial plan in tandem. We will meet with you to update your financial plan, review the funds we manage for you and consider any new legislation and how this may affect your existing or new objectives.

To find out more about our service and how we can help you, please contact Champain to arrange an initial meeting – we look forward to hearing from you.

Wealth Platform

This is where you can view your account and provides access to;

- Up to date valuations
- Documentation relating to your plans
- Our knowledge base
- Secure communication with Champain

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