



**ICONIC**<sup>TM</sup>  
**investments**

# A Relationship based on trust

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At **ICONIC investments**, all our client relationships are built on foundations of trust. We aim to earn that trust by delivering on our promises every time, by offering a consistently high level of service and by nurturing long-term relationships.

We offer honest, independent, professional financial advice based on a thorough understanding of each client's situation and requirements. With the help of industry-leading research tools, we assess attitudes to risk in detail and then present the most appropriate options, so that an informed choice can be made.



**Plan your finances to secure your future.**

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SOME OF OUR AFFILIATES





## **ICONIC investments provides the complete service:**

- **Pensions: for individuals and groups**
- **Investments: Bonds, ISAs, Trusts**
- **Tax Planning: Inheritance Tax, Capital Gains Tax**
- **Mortgages: Residential, including Buy To Let. and Commercial**
- **Protection: Life Cover, Critical Illness Cover, Income Protection, Business Insurance**

Protecting you and your loved ones is easy. While there is a vast array of products to choose from, we can help you make the best choice to suit your needs.





## Your life your choices...

Choosing the correct financial products to secure your future is more complicated than ever before, as the range of options is so wide. ICONIC investments can help to guide you through this sea of choices.

Our expert team utilises professional research tools such as Morningstar to understand your true attitude to risk. Only then do we offer appropriate advice.

Our product recommendations are always tailored to your specific needs, attitudes and circumstances.





## Spreading the risk

In these uncertain times, more so than ever before, ICONIC investments believes in the value of creating a balanced portfolio for its clients.

With links to a number of different investment houses, each offering access to multi-asset funds, ICONIC investments is able to offer a diversified spread of investment options.

Previously only available to those with substantial investment portfolios, ICONIC investments is now able to make available to all at a low cost a spread asset allocation across as many as eight different asset classes.





## **Silence those alarm bells...**

You may be worried about your pension provision or about future tax liabilities. These worries can be overcome by planning properly for your future.

At ICONIC investments, we can advise you on how to obtain the best pension provision. We can also help you to pass on as much as possible of your hard earned wealth to your heirs rather than to the tax man.

**Sleep easy, plan your retirement (and beyond...) now**



## How we work

We like to meet all our clients on a regular basis to gain a clear understanding of their changing needs and circumstances. If you are a new client, we offer an initial meeting FREE OF CHARGE. This allows us to make a basic assessment of your needs and goals.

Following this, we undertake thorough research and then provide you with a full Financial Review. From this a mutually approved plan of action is agreed. However, this is not set in stone, but is subject to regular monitoring, review and adjustment as appropriate.

As well as our clients' circumstances, the financial marketplace is changing all the time. As part of our service we provide useful regular financial updates and reports in clear plain English via newsletters and email.



You are most welcome to visit us at our Regency offices in Royal Leamington Spa, or if it is more convenient we can visit you at home or in the workplace.



Life moves quickly, make an **ICONIC** decision and  
**invest in your future.**



We look forward to helping you on your way.

Ed Hodgson - Managing Director

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