

A woman in a plaid shirt and jeans sits on the ground at the base of a large, ancient tree. She is holding a baby and looking down at it. The scene is set in a sun-dappled forest with many other trees in the background.

Castlegate Financial Management An introduction



Castlegate
Financial Management





Planning for tomorrow, today



Ever since we were established in 1994, the long-term financial security of your 'tomorrow' has been at the heart of our service to you today.

That is why we have developed our independent, whole-of-market financial planning service - to offer a comprehensive range of financial solutions to serve in helping you identify and achieve your goals.

Of course, these goals evolve as situations and financial environments change. Because we know this, we focus on building our relationship with you, keeping you abreast of all the changes important to you and regularly reviewing your current situation and your future aspirations.

Castlegate was founded on the experience and heritage of the accountancy practice, Duncan & Toplis, which has earned a trusted reputation since its formation in 1925 and is today ranked among the top 30 accountancy practices in the UK.



Planning for your future

At Castlegate, our aim is to ensure that you have the best possible advice whatever area of financial expertise you require.



Retirement Income

Do you have a road map to ensure you achieve your financial goals in retirement? We can assess your current situation and create a plan to set you on the right course.



Wealth Management

Wealth, like your health, must be carefully preserved. Your assets need protection against their potential erosion by taxation, inflation and investment risks.



Pensions

When we retire we all hope to maintain a good quality of life. Here, more than anywhere, planning today can bring peace of mind tomorrow.



Inheritance & Estate Planning

One legacy you don't want to leave to your loved ones is a large tax liability. We can develop a multi-faceted approach to help you preserve your family wealth.



Tax Planning

Taxation can be complicated and the rules and allowances often change, so it is worth discussing with an adviser the most efficient ways to arrange your finances.



Protection for Families & Businesses

Illness or accidents can have serious long-term financial implications for you and your family. We are here to help advise on ways to lay adequate protections.

Planning through long-term relationships

Trust is very important to us, and this can only be built on a sound and lasting relationship. We are therefore committed:

- to act **fairly and reasonably** with you at all times.
- to **give you information** on services and products **in plain language**, and offer help with anything you do not understand.
- to **agree the on-going service** you can expect from us.
- to ensure **you understand the financial effects of any recommendations** given and how your financial plan will work.
- to make sure that the adviser you deal with has the **appropriate training, qualifications and experience**.
- to **respond to all your queries** as quickly and efficiently as possible.

Contact us today, whatever
your financial needs are
tomorrow.

Whether you are an individual, a family, or a business owner, trustee or director we advise on a wide range of services, including:

- Investment planning
- Wealth preservation
- Retirement strategies
- Corporate protection
- Corporate retirement strategies
- Pensioner trustee services
- Shareholder protection
- Employee benefits
- Pensions & divorce
- Personal protection
- Inheritance tax & estate planning
- Trusts & trustee investments

Call us on: 01476 855 585

Or email on: **info@casfin.co.uk**



Castlegate
Financial Management



Castlegate Financial Management 8 Castlegate, Grantham, Lincolnshire NG31 6SE

Castlegate Financial Management Limited is registered in England and Wales Company number 02077374. Authorised and regulated by the Financial Conduct Authority