



**EASTWOOD
& PARTNERS**
(FINANCIAL SERVICES) LTD

Independent Financial Advisers

TRINITY
FINANCIAL ADVISERS LTD

Independent Financial Advisers

Corporate Services

A personal and professional approach to employee benefits



Eastwood & Partners (Financial Services) Ltd
Trinity Financial Advisers Ltd

Trinity Financial Advisers Ltd is an appointed representative of Eastwood & Partners (Financial Services) Ltd which is authorised and regulated by The Financial Services Authority

Menu of Services – Employer

Annual Business Review Meetings

We will carry out these reviews on an annual basis in order to ensure that your schemes continue to fit in with your circumstances and requirements. However, we will also offer more frequent reviews as changes in legislation occur or your own corporate needs demand.

Cost Containment

We will regularly check the cost of your Employee Benefit schemes (e.g. Death in Service) in order to ensure that the cost remains competitive.

Specialist advice, assistance and support plus information updates

Such advice, assistance and support will be provided on all matters related to employee pension provision and other benefits. We will also provide regular updates to advise you of any changes in the Pension / Employee Benefit market and changes in legislation.

Your own dedicated Director and Independent Financial Adviser

For ease of contact, we will provide you with a named Director and Independent Financial Adviser who will be able to advise you on all matters related to employee pension provision and benefit schemes.

Your own dedicated Scheme Administrator

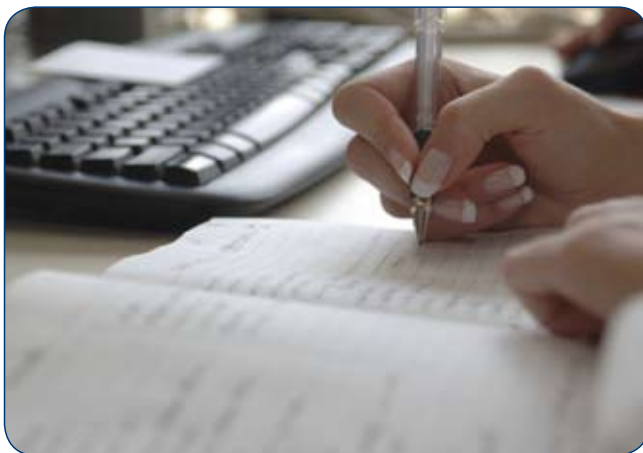
For ease of administration, we will provide you with a named administrator who will take care of all day to day administration issues.

Time Management

We will run your Pension and Employee Benefit schemes for you leaving you more time to run your business.

Effective Communication

We will provide you and your employees with clear, concise information regarding your Pension Scheme and other Employee Benefits. This is designed to help your employees understand and value the benefits that you provide.



Menu of Services – Employee

Independent, specialist pension advice

This will cover a whole range of issues in relation to the employer Pension Scheme (e.g. pension fund investment advice, retirement planning / funding exercises). The advice can also be extended to any other pension arrangements that an employee may have and a full transfer analysis service is available.

Information

We will provide employees with clear, concise information regarding their Pension Scheme and other Employee Benefits.

Regular Pension Review Meetings

Regular one to one review meetings to help employees check whether their pension planning is on track for their retirement.

Group Presentations

To provide employees with full details of the Pension Scheme and other Employee Benefit Schemes.

Dedicated points of contact

For ease of contact, employees will be provided with a named Independent Financial Adviser and Administrator.

Individual Financial Planning Advice

Independent, whole of market financial advice will be available to employees on all personal financial planning issues.

Retirement Assistance

We will explain the various options available to employees at retirement and help them choose the one most suitable to their circumstances and requirements.



The Corporate Services Team

Eastwood & Partners (Financial Services) Ltd and Trinity Financial Advisers Ltd have always offered a full financial planning service to employers and their employees. We have had a great deal of success in this area over the years and as a result of the two companies joining together, we have introduced a dedicated Corporate Services Team in order to make our corporate offering even more attractive.

The Corporate Services Team comprises of qualified Independent Financial Advisers and a dedicated administration team. The Corporate Services Team will specialise in corporate financial planning and will dedicate its time to advising and assisting employers and their employees.



The team as a whole will provide consultancy and administration services which cover the following areas.

- Director / Employee Pension Provision
- Key Person / Shareholder Protection
- Death in Service / Group Income Protection / Group Critical Illness Schemes
- Group Private Medical Insurance

The previous two pages detail the services that we are able to offer to both employers and their employees and explain how these services can be of benefit. We are more than happy to arrange a free of charge, no obligation meeting with employers in order to provide full details of the services on offer and their benefits.

About us

Eastwood & Partners (Financial Services) Ltd and Trinity Financial Advisers Ltd are part of a privately owned insurance broker group based in Huddersfield, West Yorkshire, which was formed in 1990 but incorporates companies and client relationships established for over 40 years.

The organisation has grown rapidly in recent years and in total now employs over 90 people at our Northumberland House office, located in the centre of Huddersfield and also at Pennine House, Elland where the Financial Services Division is based. An office in Sheffield was also opened during 2008.

The purchase of the share capital of Trinity Financial Advisers (then based in Halifax) was a major expansion which occurred in November 2007. Trinity had a similar ethos and was of a similar size, thus the financial services client base, adviser team and support staff more than doubled. We currently employ nine appropriately qualified advisers and nine support staff.

The philosophy of the Financial Services Division is simple and is to offer a highly personalised, quality service on a long term basis to a valued client base which ranges from small businesses to PLCs together with a large number of private clients, many of whom are high net worth individuals. This brochure relates to the Corporate Services Team but full details of the comprehensive financial planning services on offer to individuals are available within a separate pack.

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