WealthWave Financial.

Riding the waves of wealth towards a brighter and more secure financial future together.

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Who we are

WealthWave Financial was founded on the belief that everyone deserves access to high-quality financial advice and guidance. Our name represents the idea that wealth can be created and managed in waves – sometimes it's 'smooth sailing', and other times it can be 'choppy' and slightly unpredictable - this is where our team can support you.

Our team of experienced professionals are dedicated to helping you navigate the ever-changing landscape of finance and achieve your long-term goals.

HARRY THIEL

Partner and Financial Planner

Harry takes the helm at WealthWave Financial after advising for a number of years at another firm in York. Committed to helping clients reach their financial goals, he offers personalised solutions to suit their individual needs. Holding qualifications in Financial Planning and Mortgages, Harry has the expertise to create effective financial plans.

PETER FORD

Non-Advising Partner

Peter has over thirty years of experience working in Financial Services. Over the years, he has been a valuable resource for numerous individuals and small businesses, forming lasting client relationships that stretch across two decades. Peter founded WealthWave Financial and brings a wealth of knowledge and experience to the table.

Values

WealthWave Financial believes that everyone deserves access to high quality financial advice. Our main values, designed to help us achieve this, are;

Individual

It is important to us that we help our clients understand their current and future financial situation.

Long Term

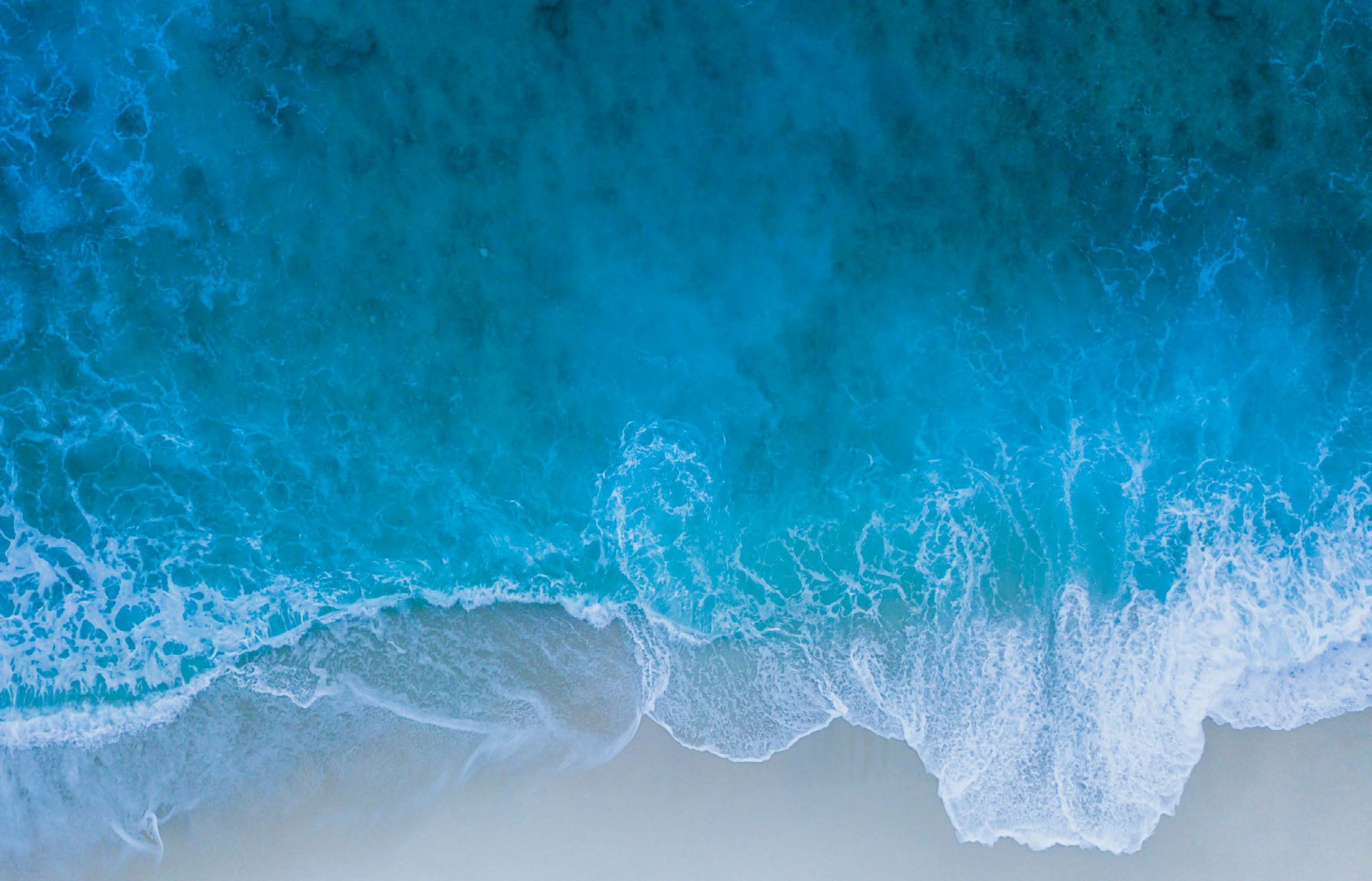
Our plans are built based on the individual needs of our clients and aim for long term financial confidence and reassurance.

Education

It is important to us that we help clients to be aware of and understand the context and any issues surrounding their financial situation and future.

Value

We want our clients to feel the value we add to their financial plans and know that we deeply value the opportunity to collaborate with them to achieve their goals.



"Harry was punctual and smart, listened to our requirements and presented a recommendation concisely and professionally. I would have no hesitation in recommending him to others."

Financial Planning Client

Who we work with

We work with a variety of clients, ranging from first-time buyers and those taking their first steps on their investment journey, to those in later life and in retirement.

Building for retirement: Those who have time to put a saving strategy in place to prepare for retirement.

In retirement: For those aspiring to achieve financial freedom and a fulfilling retirement.

Business owners: Ambitious business owners seeking financial success and growth.

First time and seasoned investors: Savvy investors aiming to maximise their wealth and returns.

Later life: Clients in the later stages of their life looking to plan for the future.

First time and seasoned property buyers: Individuals who are looking to take the first or the next step in their property journey.

What we do

At WealthWave Financial, we provide comprehensive financial planning focused on you. We believe that everyone deserves access to high-quality financial advice, no matter what stage of life you're at, or what your financial goals are. Your financial success is our top priority, and our dedicated team is here to guide you every step of the way.

Protection advice

Helping you to protect your loved ones from life's uncertainties by offering tailored solutions to suit both your personal and business circumstances.

Retirement planning

Our team will work with you to assess and create a plan to achieve your retirement goals, and continuously monitor the plan pre and post retirement to ensure you stay on track.

Later life

Preparing for your future to ensure your personal, financial, and healthcare needs are met as you age. It includes decisions about retirement savings, estate planning, and long-term care, giving you peace of mind.

Financial planning

We can help you to define, outline and achieve your financial goals with a step-by-step plan.

First time and seasoned investors

By analysing your views on and experience with investing, we'll help you identify the right risks to take and avoid the wrong ones. We'll also discuss suitable tax structures to optimise the growth potential of your investments.

First-time buyers/homeowners

Whether you're a first-time buyer, or planning your next move, we can help you arrange a suitable mortgage to help you to achieve your long-term goals.

Please note, investments may fall as well as rise and you may not get back what you put in. Your capital is at risk. Pensions cannot be accessed until age 55 (57 from 2028). Your home may be repossessed if you do not keep up with your monthly repayments. Protection plans typically have no cash in value at any time and cover will cease at the end of term. If premiums stop, then cover will lapse.

Process

To ensure all our clients receive the same high-quality advice and guidance that we offer, we run through the following process;

Initial meeting

1

It's just as important that you get to know us, as much as we get to know you. The initial meeting is an opportunity for us to get to know you and your circumstances, and for you to ask us any questions that you might have.

Information gathering

2

If we're both happy that our values align and we're happy to begin the process, we'll start to dig deeper. To build a wider picture of your financial situation, we'll ask you for details about your current financial arrangements, your goals and your values.

Research

3

We'll then get to work completing initial research on any existing policies you may have and start to construct some initial cash flow models.

Planning meeting

4

We'll then schedule a meeting, at a time to suit you, to discuss and analyse your existing financial situation, the potential opportunities available to you, and any associated risks involved.

Recommendations

We'll make sure your financial plan and any product recommendations are fully documented for you. We'll discuss this document with you, giving you the chance to ask any unanswered questions and ensure you're happy and confident with our recommendations.

Implementation

When you're completely happy with our recommendations, we'll get to work implementing your financial plan and arranging any products to keep you on the right track.

Review

Regular review meetings will be scheduled to ensure that your financial plan is still on track, as well as ad-hoc reviews or communications based on market or legislation changes.

Any questions?

Please get in touch with the team who'll be happy to answer any questions you have regarding our process.

Benefits of working with an adviser

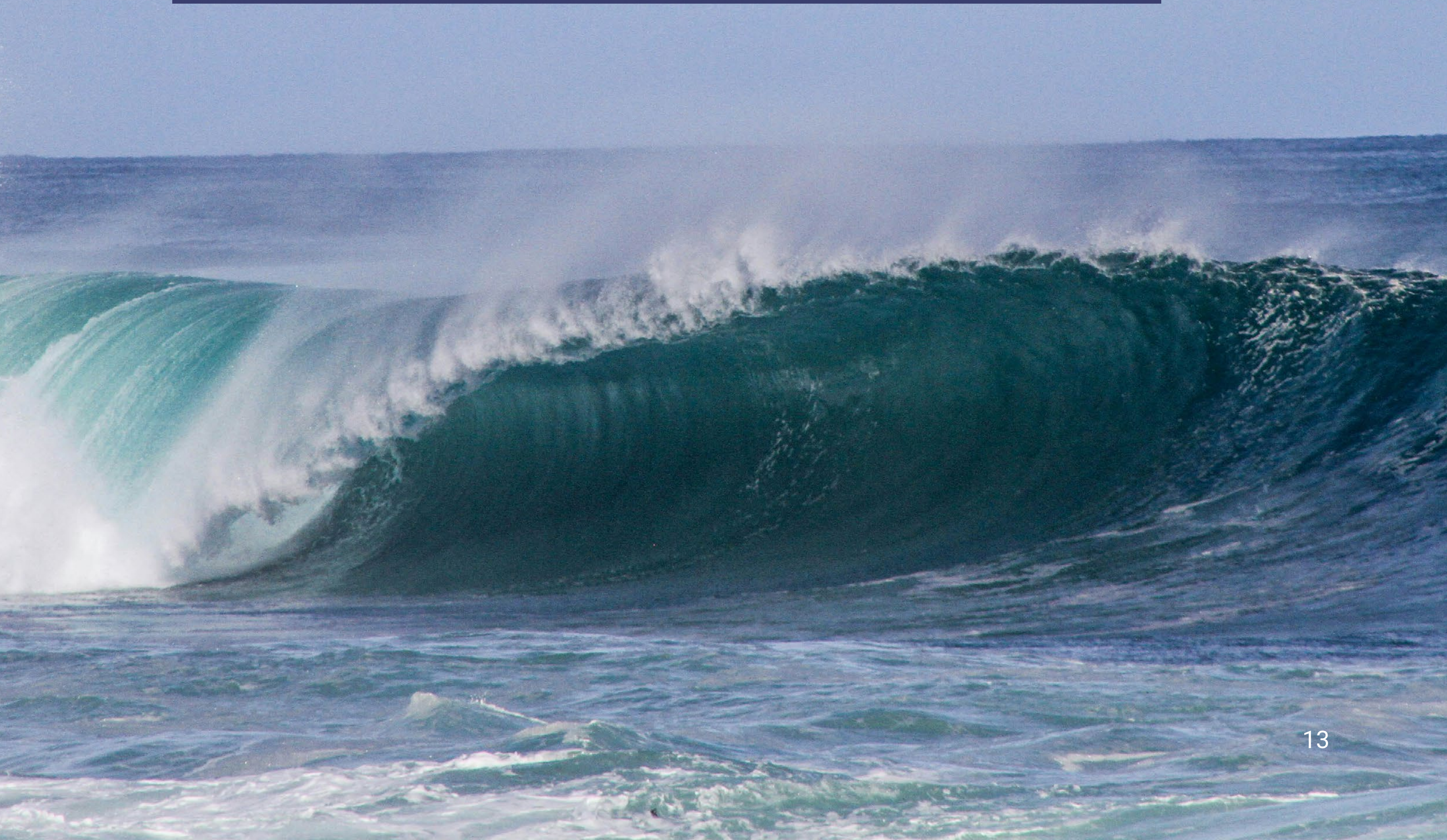
Working with an adviser has a series of advantages including;

- Making an investment based on financial advice and a recommendation means you're much more likely to get a product that **meets your specific needs** and is suitable for your particular circumstances.
- We can **put together a plan** to help you meet your short, medium and long-term goals, and **keep you on track** to reach these goals with regular reviews.
- Access to a **panel of providers**, allowing us to research the market and make your money work hard for you.
- Years of **technical expertise** and guidance, which is especially important when you have potentially difficult financial decisions to make.
- We're constantly researching the market, so you'll receive **regular updates** when there's new legislation or market changes that may impact your investments.
- Working with an adviser will **reduce the jargon** and provide **peace of mind** around financial products, costs and charges, and the financial planning process as a whole.

"Harry Thiel, on behalf of Wealthwave Financial, provides an excellent service and responds promptly to requests for advice or when a requirement to withdraw or deposit monies arises. Harry also arranges regular face-to-face reviews which provides reassurance that he has our interests at heart."

Financial Planning Client

★ ★ ★ ★ ★



Where to find us

If you've got any further questions, please click here to organise a call back. Alternatively, you can contact us using the details below.

Call us

We are here to answer any questions.
Feel free to give us a call on 07968 514003.

Email us

For general enquiries & any questions, contact us via email: info@wealthwavefinancial.co.uk.

Keep up to date

Head to our LinkedIn page to make sure you're up to date with our latest news.

wealthwavefinancial.co.uk