



WHY CHOOSE MCCREA FINANCIAL SERVICES?

Looking after your personal finances can be complex. This is why financial advice can be so important. At all stages of our adult lives we have to think about our financial situation.

When we are young we tend to work as hard as possible to establish a base for a future standard of living. A mortgage is often the first contact we have with the complexities of the financial world.

Insurance and savings come next, along with protection, to safeguard the family and children's upbringing. Throughout, we have to think about what we are going to live on when we stop working. We have to deal with taxation - none of us want to pay too much nor fall foul of HMRC. Once we have acquired wealth, preserving it and indeed allowing your wealth to work in the most appropriate way for you, is another issue to be addressed.

There is no simple answer but at McCrea Financial Services, we believe we can offer sound financial advice in a friendly and professional manner. As one of our clients you would receive the benefit of our many years experience in helping people obtain the maximum benefit from their financial planning.

Where have we come from?

McCrea Financial Services Ltd was established in April 1999 by Douglas McCrea, who, after many years working for leading financial institutions, recognised

the need for a comprehensive, yet personal service encompassing all aspects of financial planning.

We have strived to continually move forward for the benefit of our clients by developing new solutions and expertise to meet ever changing needs. Our client focused approach to solving complex situations has helped our clients to flourish.

The emphasis placed by all our staff, both advisers and administrative, is to look after our clients and give ongoing advice and support. We take great pride in the quality of our staff and we strive to offer clients a personalised, friendly and professional service to the highest standard.

Where can we take you?

We are committed to the concept of independent advice and its benefits to clients. We also believe in the importance of delivering a tailor made personal service to both businesses and individuals.

At McCreas we can offer you a wide range of investment, retirement, protection, mortgage, tax and financial planning services – for individuals, partnerships and companies.

Being independent, we can provide a comprehensive and unbiased review of your financial affairs.

Our approach creates a planning strategy tailored to your specific requirements by:

- Identifying your financial objectives and helping you reach those targets
- Reviewing in detail your current financial arrangements
- Implementing a financial plan which encompasses the full range of products available to us, and you, by being independent
- Continually reviewing and updating your financial affairs by meeting with you on a regular basis. This allows us to provide ongoing advice and assistance

Our philosophy is based on discussing and analysing client circumstances and goals, and working with you to try to achieve these aims. This is done by working together; looking in detail at your objectives and circumstances and providing the most appropriate financial services solution. At all times we remember that a personal and professional service helps us to help you, the client.

McCrea Financial Services are authorised and regulated by the Financial Conduct Authority. Registered in Scotland. SC191039.

Your Home may be repossessed if you do not keep up repayments on your mortgage. The Financial Conduct Authority does not regulate tax planning.

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