

Life is more
certain when
it's powered by
good advice

evelyn
PARTNERS



The power of good advice

Life is full of decisions and choices that shape our future. Making great decisions requires as much certainty as possible – the kind of certainty that comes from good advice. Our advice is backed by almost 200 years' experience in helping people and businesses flourish.

At Evelyn Partners our mission is 'to place the power of good advice into more hands'. We believe that more people and businesses should have access to good advice, regardless of their size or wealth. We are committed to raising the standards of good advice and to extending its reach.

We are the UK's leading integrated wealth management and professional services group. We look after the combined wealth and tax needs of our clients and provide specialist accountancy, assurance, tax and advisory services for businesses. Our clients range from online investors to those requiring bespoke wealth management, and from charities to entrepreneurs and corporate businesses.

All our advice is delivered by people who care, who go further to understand your needs so they can help you make those big decisions with ease and confidence, bringing *you* closer to what matters *most to you*.

The power of good advice since 1836.

Welcome to Evelyn Partners

Tilney Smith & Williamson has become Evelyn Partners, and a new chapter in our story has begun.

Our merger means we can offer a unique range of combined services for our personal and business clients.

From Tilney's beginnings in 1836 to the founding of Smith & Williamson in 1881, we've been helping people and businesses flourish for nearly two hundred years.

Our longevity is a testament to the power of good advice. The kind of advice that comes from someone who knows you well. The kind of powerful good advice that you can always expect from us.

Because we take the time to truly understand you. What motivates, inspires and drives you. We believe good advice should be available to everyone who needs it, giving them the confidence to make great decisions.

With over 3,000 people in 27 offices in the UK, Ireland and Jersey, we can help you achieve your ambitions and are just as committed to delivering a world class experience to our clients today as we always have been.



400+

Tax specialists



265

Qualified financial planners



290

Investment managers



180+

Years of experience

**These figures are correct as at June 2022*

We're here to help you flourish.

Wealth management for individuals and families

If you want to enjoy your wealth now, secure it for the future or use it to navigate life's unexpected hurdles, we have the knowledge and experience to help you plan for all eventualities. Through all of life's moments we're here to help you plan, manage and future-proof your financial lives, letting you look ahead with confidence.

Plan for your future

We have the financial planning knowledge and experience to steer you through the complexities of growing your wealth, so you can look ahead with confidence.

Power your investments

Knowing what you can do with your wealth can be a big responsibility. Our investment managers have expertise you can lean on to achieve your goals.

If you prefer to manage your own investments Bestinvest, our online investment service, can provide you with everything you need.

Stay on top of your taxes

Our specialists can help you navigate the maze that is tax rules, legislation and compliance and see your taxes through a new lens.

To see how our good advice can help you,
call us on **020 3131 5203**



Our business services offering

Whether you're a founder, a senior executive or running your family business, we can manage your personal finances and look after your business too.

Stay on top of your accounts

From outsourcing your business administration to accounting and tax compliance.

Plus ensuring you have effective and accurate financial systems and controls in place, we can help your business function more efficiently.

Transform your business

Our specialist advisory and assurance partners can help you navigate the next phase for your business.

Whether that involves UK or international growth, corporate finance restructuring, business transformation or turnaround, they are here to help.

To find out more about what we can offer, call us on **020 3131 5203**

Support your employees

Give your employees the power of good advice through a programme of support designed to improve their financial wellbeing.

Our experts from across pensions, employee benefits, employment tax, financial planning and investments work together to offer imaginative yet pragmatic solutions, ensuring your employees get the most from their benefits and rewards package.







How we work with you

We take the time to truly understand you, what motivates, inspires and drives you. So that we can give you the certainty to make the decisions to bring you closer to what matters to you.

Whether you're a private client, family office, trustee or corporation operating in multiple jurisdictions, our knowledge helps us understand the challenges and pressures you face in protecting and growing your wealth.

Personal

We treat you as an individual

We're a people business at heart, and strive to deliver a friendly, inclusive and personalised service to all our clients, large and small.

Partnership

We go further together

We develop relationships that stand the test of time, spanning multiple generations.

Performance

We strive for more

We are ambitious for our clients and for ourselves, so we aim to be a forward-thinking and innovative business that leads the way in the industry.

"I'm impressed by the personal touch. The people I work with have a thorough understanding of my aims and values and advise accordingly. I always feel they are on top of my needs."

Jonathan, Client



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