



## A.S. ADVISORY

BANKING, FINANCE  
& INVESTMENT

To provide completely independent banking, financial and investment guidance to assist clients achieve banking facilities and financial investments best suited to their individual short and long-term requirements.

### BANKING:

Identify, source and implement an appropriate banking structure including;

- Current accounts (personal/corporate/trusts)
- Deposit accounts
- Bank Finance - Overdraft/Loan requirements
- Treasury Management – Liquidity, Interest Rate and Currency management

### FINANCE:

Introduce financial advisory services to provide;

- Mortgages
- Insurance – life/critical illness/home & contents/property/car etc.
- Private Health plan
- Pension planning

Introduce accountancy services to provide;

- Tax returns
- Corporate planning
- Tax planning

### INVESTMENT

Introduce wealth management services to provide;

- Investment advice (equities/bonds/currencies/commodities etc.)
- Other tax efficient vehicles (e.g. VCTs/EIS)
- Source and introduce third party finance/investment opportunities for the purpose of;
- Capital/Equity investments
- Bespoke private investments