



Investment Planning

Prestfield Wealth Management was established when its Principal John Myatt accepted an invitation to join St. James's Place Wealth Management. The vision was to provide clients with access to both financial advice in the comfort of their own home, as well as being able to visit a high street location for advice.

St. James's Place is one of the UK's leading wealth management organisations, managing client funds of £96.6 billion. The company was founded in 1991 by the late Mike Wilson CBE, Sir Mark Weinberg and Lord Rothschild and today through its partnership provides reliable and expert advice in all aspects of wealth management.

Reliable wealth management advice and creating the right investment strategy are crucial elements in helping to secure your future financial well-being. Whether you are looking to invest for income or growth, they can provide the quality advice, comprehensive investment solutions and ongoing service to help you achieve your financial goals.

St. James's Place's carefully constructed, risk-rated portfolios enable you to spread your investments across a wide range of global asset types and choose fund managers with different investment styles to create a balanced and diversified investment solution.

The value of an investment with St. James's Place will be directly linked to the performance of the funds selected and may fall as well as rise. You may get back less than the amount invested.

The levels and bases of taxation and reliefs from taxation, can change at any time. The value of any tax relief generally depends on individual circumstances.



Investing for Income



ISA and Junior ISA



Unit Trusts



Retirement Planning



Investment Bonds



Offshore Investments

Prestfield Wealth Management LLP represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the Group's wealth management products and services, more details of which are set out on the Group's website at www.sjp.co.uk/products. The 'St. James's Place Partnership' and the titles 'Partner' and 'Partner Practice' are marketing terms used to describe St. James's Place representatives.