stonehill
FINANCIAL

Making Money Simple

Stonehill is a financial services business which provides wealth management services and independent financial advice to a broad range of private individuals, trusts and small businesses. Formed with over 100 years of personal experience in the private client financial advisory profession, Stonehill Financial continues to strengthen and develop lasting relationships with all our clients.

- Solutions and explanations will be simple and effective.
- Access to your money - at all times - and without cost.
- Your own Stonehill Financial Portal.

We will not advise you without first having a comprehensive understanding of you and your lifestyle.

With a clear demonstration of integrity, professionalism and clarity in communication, our aim is to be a long term and trusted partner to clients. A relationship based on trust, honesty, integrity, experience and understanding. We speak in a common language that's plain English, ensuring transparency and clarity at all times. In order for us to maintain our exceedingly high standard of advice, we strive to understand everything that we can about our clients in order to assist in managing their financial planning and individual situations. This helps us to deliver the outcomes that our clients require at different stages of their lives.

We offer a comprehensive range of services (please see our list of services provided) from arranging a mortgage to the lifetime management of your wealth and finances.

Financial planning is the specific process undertaken to assess, recommend, implement and review the plans and solutions to deliver your aims and objectives over time. Wealth Management and the Financial Planning within it apply to all areas of your personal wealth creation and management.

We give the best financial advice through changing times
Whether it's depression, recession or rampant inflation, we aim to insulate our clients' money from the worst effects and find new opportunities for growth.

We've maintained our independence
Independent financial advisors like us are not tied to any one institution, or any one segment of the personal planning spectrum. We are tied only to you and we work with you for the best planning outcomes.

We'll never grow too big
Our first concern is always to offer our existing clients the best financial advice and service we can. So when you become a client of Stonehill you'll know we have the capacity to do the same for you.

We're frank about fees
We will tell you in advance how much our services will cost.

Our Clients
The greatest single compliment we can take from a client is when they are comfortable and confident to refer us on to one of their personal contacts.

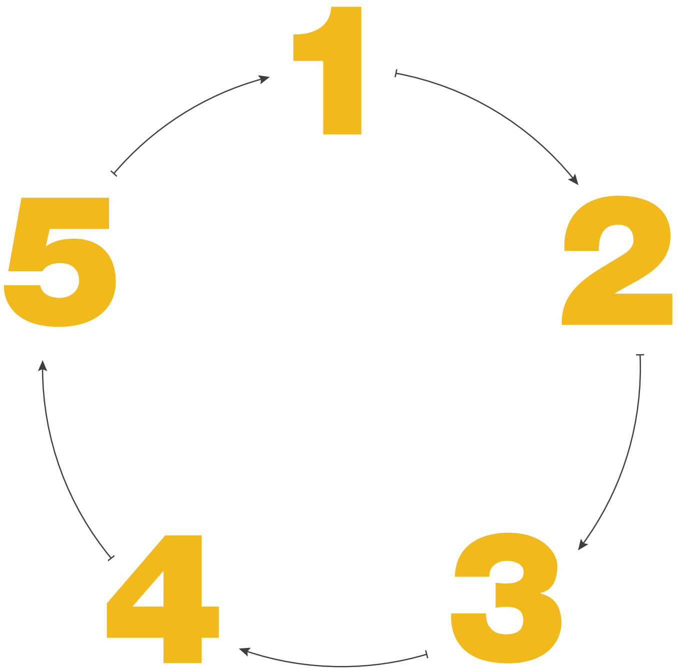
In order for us to maintain our exceedingly high standard of advice, we strive to understand everything that we can about our clients...

How we work

Our 5 Step Process

Face to face meetings, phone calls, and written communications are at the heart of your relationship with your adviser at Stonehill. But developing a financial plan and implementing strategies to help you achieve your goals also involves hours of preparation, strategic thinking and research.

We aim to provide all clients with clear financial direction. This is achieved by having a full understanding of your current financial position, your objectives and identified needs; this enables us to provide suitable solutions for you in order to treat you fairly. Our aim is to reduce future barriers to these objectives and to maximise the opportunities for achieving your goals.



Here is how the process will unfold:

1. Discovery – together, we will gather as much financial information as we can about you. This is the time for you to outline your issues and concerns, and your first opportunity to discover how Stonehill work. During this time we will identify what your objectives are, and what your needs are – the two key pillars for creating your plan.

2. Analysis and Planning – using the information gathered we will develop a detailed financial plan. This culminates in a discussion document that outlines a strategy tailored to your needs to demonstrate how your objectives and needs can be met.

3. Advice Consultation – we will progress to a discussion about the plan in greater detail. We will confirm why we have chosen specific solutions and at this stage confirm the actual costs to you.

4. Implementation – the team will make sure that all the recommendations that you have agreed to will be implemented. This will include liaison with your other professional representatives where relevant.

5. Ongoing Review – to ensure that your plan remains relevant and is kept on track we recommend we meet regularly to review your circumstances and the progress being made. The best financial plans are those owned by clients with consistent adviser contact.

What services we offer

Today, we offer a comprehensive range of services, from arranging a mortgage to the lifetime management of your finances.

We advise clients on:

- Managing Investments and Risk
- Planning for retirement
- Protecting your family
- Managing your borrowings

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