



Being in Retirement

Judith's story

"I have dealt with Grosvenor Birch for many years. They handle my Company and my trusts as well as my personal finances.

Recently my husband passed away & my own health has suffered but the support I have received from Elaine and her team has been invaluable.



Working with other professionals in my best interest

Elaine was very quick to react when my husband first became ill. She contacted our solicitor & working together with our accountant their actions saved significant amounts of tax and protected my business and my family. Knowing that she was coordinating everyone and dealing with all the complications that arose made a huge difference to me.

She still meets regularly with my trustees, solicitor and accountant. She also assists the team who manage my Company.

Adapting to changes in legislation & taxation

Elaine has the ability to make complicated matters seem clear: I find this helps me when I have important decisions to make.

My financial plan is constantly adapting and Grosvenor Birch helped me take advantage of some recent reforms. Now my pension owns the buildings my business operates from and I receive a tax free pension!

Help when it's needed

I am confident that the legacy started by my husband is in safe hands and my daughter and granddaughter will have someone to turn to when they need it.

I have always been more than satisfied with the reliable and friendly service we have received. Their dedication to detail and the way they run their business is so without fault I cannot praise them enough for their attention and honesty and personal service."

Judith Matthews,
Guardian Automotive Ltd, West Moors



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