



Cornerstone
Asset Management

A dynamic partnership

Helping you to navigate your financial path through life, steering you through change and complexity to ensure you achieve your personal and financial goals.

www.cornerstoneam.co.uk

We do not rely on jargon to demonstrate our expertise, preferring to work on proven processes and practical solutions which are designed to deliver consistent outcomes and meet your expectations.



About Cornerstone

Cornerstone was founded by a highly dedicated and experienced team of financial professionals in 2010 with the aim of building a lasting, intelligent and trusting partnership with each client.

We provide clients with a carefully informed insight into the highly complex world of wealth advice and financial planning and make every client experience as straightforward and stress-free as possible.

Today Cornerstone continues to evolve primarily through client recommendations and professional service group introductions.

We are also proud to have received multiple leading industry awards, recognising us as leaders in providing exceptional advice and service to our clients.



Clarity and vision

Dealing with financial matters can be difficult. Legislation is complex and ever changing, we tend to live for today not tomorrow and prefer not to think about retirement, tax bills and what happens to our loved ones when we are gone.

The Cornerstone planning and wealth advice process aims to remove risks, obstacles and burdens from your financial journey and greatly improve progress towards your personal and financial goals.

By starting with a detailed examination of a client's profile, including needs,

ambitions and views on risk, we create a personalised assessment of each area. This is followed by a tailored set of recommendations, ranging from investments, through to retirement planning and tax structuring.

We combine expert specialist advice and a long-term relationship with a highly professional and well executed financial planning and investment process. To deliver our service, we integrate quality people, efficient processes and the latest technology to create the best client experience and consistency of outcomes.

**The value of investments can fall as well as rise.
You may not get back what you invest.**

A scenic view of a wooden pier extending into the ocean under a blue sky with clouds. The pier is made of dark, weathered wood with visible grain and cracks. The ocean is a deep blue, and the sky is a lighter blue with some white clouds. The text is overlaid on the right side of the image.

From your first meeting or contact with one of our financial planners, you will follow a logical and consistent process which ensures you receive a comprehensive, high quality financial planning service.

Wealth management and financial planning

Cornerstone is an independent firm with unrestricted access to investment solutions and financial products.

We offer a professional and all-encompassing service which delivers financial planning for all stages of the wealth cycle, from the first shoots of planning and saving to ultimately harvesting the rewards of your efforts when you retire or choose to pass wealth on to the next generation.

There's little point in saving for your child's school fees but doing nothing to plan for your retirement, or carefully planning ahead for long-term care costs but leaving your estate at the mercy of the taxman.

Cornerstone's experienced and highly qualified professional advisers will provide joined-up solutions that cater for all your financial needs both now and in the future.



As you go through life, you'll reach different milestones, each of which you'll need to plan financially for. Helping our clients to plan ahead to achieve life's goals is all what Cornerstone is about.



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