Your financial life with us

Taking you where you want to be

AWS ADVICE

AWS Advice is a financial planning practice specialising in creating and implementing unique strategies to assist clients reach their personal objectives and goals.

Who we are

Based in the heart of the city of London, we are a financial planning practice providing wealth management services to private clients. We're a team of highly experienced and knowledgeable people, specialising in creating and implementing strategies which help you build your wealth and reach your personal objectives and goals.

What we do

We offer strategic and holistic financial planning advice which is thoughtful, refreshingly clear and highly focused on your individual needs, aims and objectives. As each person's circumstances are unique to them, our support and advice are tailored to your lifestyle, financial goals and aspirations. We listen, we think and then we deliver.

We are a boutique practice distinguished by the lifetime relationships we build with clients.

About us

Originally founded by principal Devesh Ambasna in 1981, re-branded as Ambasna Wealth Solutions in 2011 and latterly becoming AWS Advice in 2017, we are a boutique practice distinguished by the lifetime relationships we build with clients.

Serving our clients and helping them make their hopes and aspirations a reality is what we're all about. Our success is down to an ethos embraced by all members of the team, made up of a strong desire and willingness to help. In a very personal business, what sets us apart is an attitude that is welcoming, warm, approachable, patient and helpful.

We believe we provide the best of both worlds: a highly personalised service, through a dedicated small client service team, and backing from a well-resourced national company.

Our team

Our people are carefully chosen, and we invest heavily in their training and development. We never forget that clients have a choice; when you choose to work with us, you'll be assured of dealing with qualified experienced professionals who are astute, motivated and dedicated to our ethos of aiming to provide unrivalled individual service. It's thanks to our people that our clients stay with us, and new clients come to us by personal introduction.

Our team comprises financial advisers and planners, technical experts and paraplanners, client liaison staff and skilled senior administrators.

Whatever your financial needs, we can meet them through our specialist knowledge and experience.

Our approach

Combining careful planning and creative thinking with energy and experience, we help you towards making your financial aspirations and goals a reality.

Our nine-point client pledge:

People:
Your affairs are always managed and implemented by the same team of highly qualified and experienced people, ensuring continuity, stability and the reassurance that you can rely on us.

Time:
We take time to really listen and get to know you; it's this understanding that enables us to deliver the results you want. And when we're discussing our strategies and recommendations, you are assured of as much time as you need.

Clarity:
We are plain speaking; we avoid jargon whenever we can. We keep things as straight-forward as possible while we guide you through the maze of the financial world. We always give you as much, or as little, detail as you want.

Service:
There is always someone on hand to receive your call or email, and we respond in a timely fashion. Our approach is communicative, relaxed, non-judgemental, highly personal and responsive. Our clients tell us they feel valued, respected and cared for.

Technology:
In today's digital age, we invest heavily in innovative IT and systems. We use cutting edge technology and appropriate tools to explore better ways of helping clients build their wealth. Our robust processes mean your information is protected and secure.

Performance:
Ultimately our business is about financial performance and we are proud of the results we achieve on behalf of our clients. We do this through a combination of careful planning, clear thinking and insightful advice.

Advocacy:
Our aim is to become part of your team, understanding you, your financial world and your aspirations. You can depend on us to support you with all your financial matters, guide you and your family on life's journey, and liaise with your other professional advisers whenever necessary.

Transparency:
When it comes to our fees, we guarantee no surprises. All our work and costs are fair, transparent and explicitly agreed with you in advance.

Experience:
With more than 70 years of adviser experience in our team, it's fair to say we know the ropes, we're fully aware of the pitfalls and know how to avoid them. Having navigated the business through several recessions, stock market crashes and countless regulatory changes, we have the skill and resilience needed to give clients peace of mind and results.

Everyone at AWS is always a pleasure to speak with and take time to give the personal touch which I really appreciate. SS

Our range of services

- Strategic financial planning
- Investments
- Pensions and retirement planning
- Estate planning
- Protecting your family
- Mortgages

Your financial life with us.

SAVING

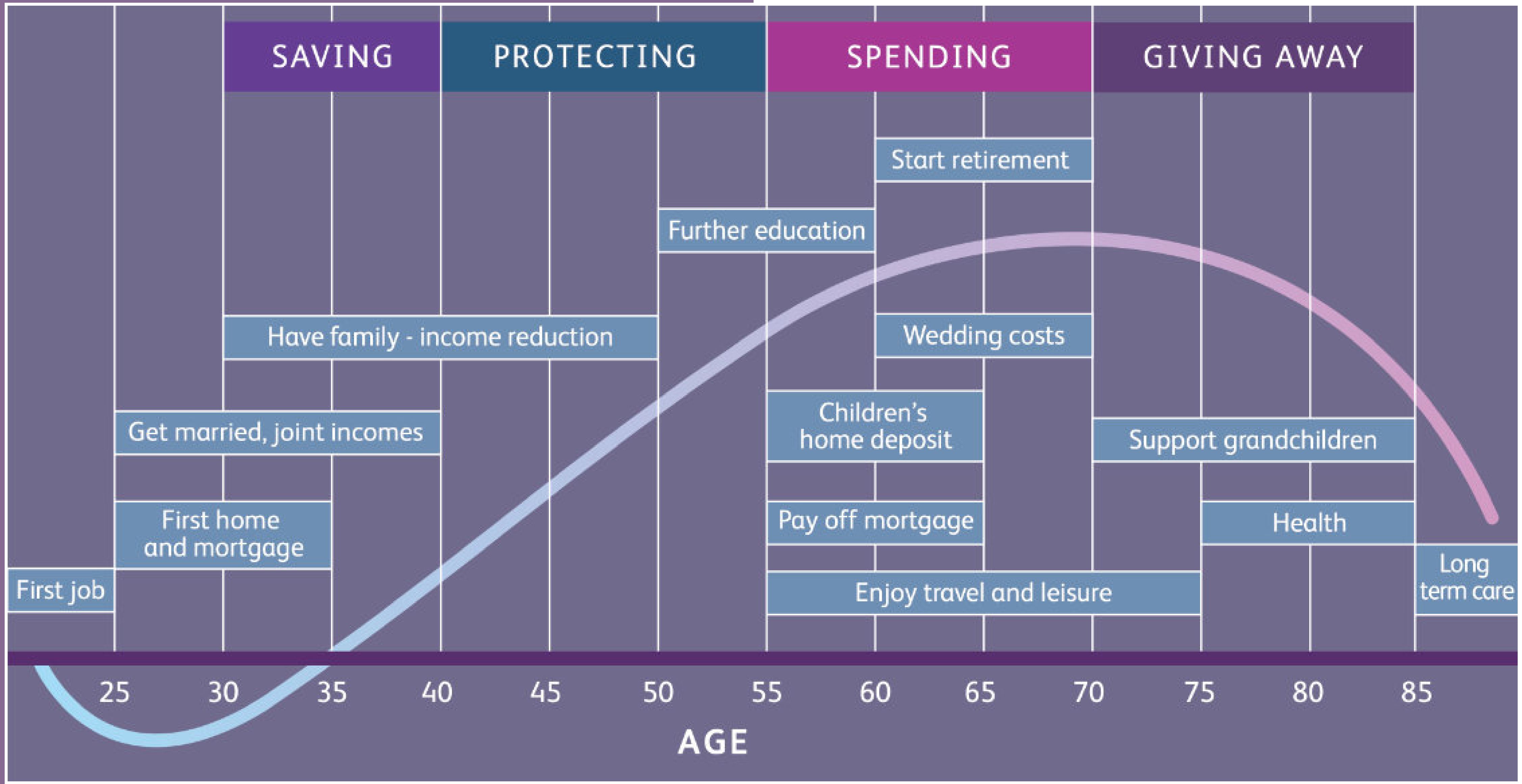
Creating and expanding your wealth

From the outset, we build up a clear picture of where you want to be in the short, medium and long term, and we then work with you and use appropriate solutions with the aim to help you build your savings.

PROTECTING

Preserving your wealth

You wish to protect your hard-earned worth against both unforeseen events, such as serious illness or early death, and inevitabilities such as taxes and inflation. Through our specialist support and advice, we help to protect you and your family's standard of living whatever life may throw at you, and preserve the value of your estate for the benefit of your family.



SPENDING

Benefiting from your wealth

A primary driver for us is ensuring your money works as hard for you as it can, and that you get to enjoy spending your hard-earned or saved wealth, whether that be through property, travel and holidays, hobbies and pastimes, or supporting your family maybe with education. You surely want to maximise your standard of living and be as tax efficient as you can.

GIVING AWAY

Distributing your wealth

Through careful estate planning, you can make sure your assets are appropriately and tax-efficiently distributed to your family, either during your lifetime or after your death, and you can ensure your wishes are met after your death.

"I'm grateful for all the support to myself and my family by AWS over the past few years and for their continuous kind advice and encouragement along the way. AF (CEO)"

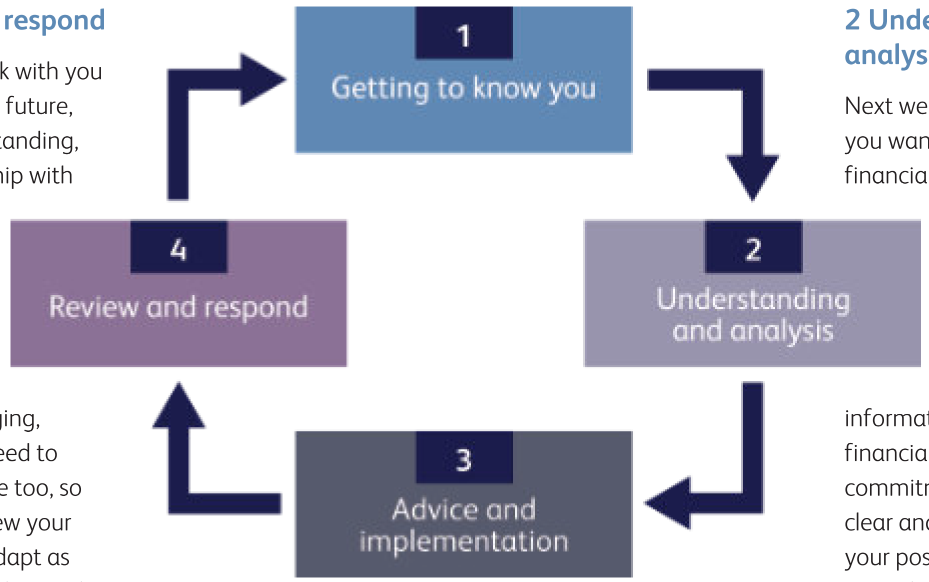
HM Revenue and Customs practice and the law relating to taxation are complex and subject to individual circumstances and changes which cannot be foreseen.

Guiding and supporting you through the complex world of finance, we provide peace of mind and bring your financial dreams to fruition.

Your journey with us

1 Getting to know you

We set out to learn as much as we can about you; your financial world, your hopes and aspirations, concerns, opportunities and your strengths. We tell you about ourselves, our services and our costs, and then we jointly agree how we work together.



2 Understanding and analysis

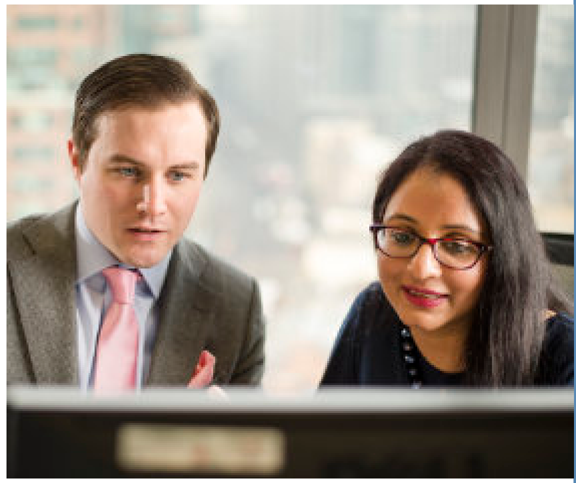
Next we dig deeper into what you want to achieve; your financial goals, objectives and priorities, and the reasons behind these. We then create a plan to help you realise those wishes. We gather and review information about your current financial plans, policies and any commitments, so we gain a clear and detailed picture of your position and how you arrived there.

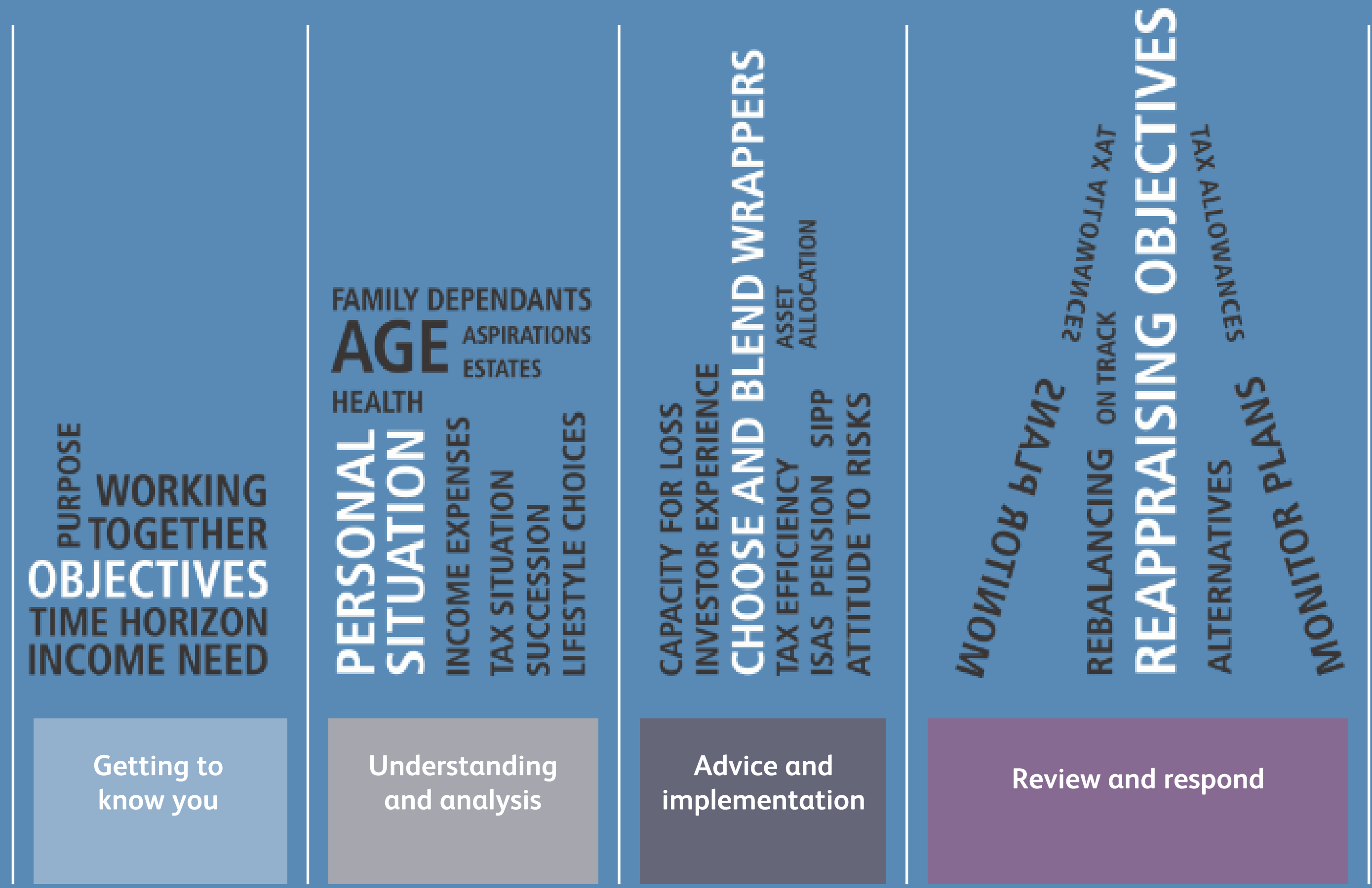
3 Advice and implementation

We then pull it all together and provide you with tailored financial recommendations. This takes the form of a personal, holistic investment strategy, which explains what we recommend and why. Taking as much time as you need, we ensure you understand and are happy with the proposed route, answer any questions and agree a timeframe for implementation. The strategy then comes to life as we support you with making any applications, and monitor your applications through to full implementation.

4 Review and respond

Our aim is to work with you now and into the future, building a long-standing, trusted relationship with you. As the financial world is constantly developing, and your circumstances are always changing, financial plans need to continually evolve too, so we regularly review your arrangements, adapt as and when needed, provide continuing support and servicing and invite you to regular meetings to review your personal circumstances. We also get in touch between times if we feel something is relevant to you.





Who is involved?

Your Adviser supported by:

- Technical Team
- Compliance Team
- Specialist Advisers
- Openwork Investment Committee

The AWS Private Client Offering.

Building strong, long-lasting relationships with our clients means that both parties benefit. You'll be sure of continuity, meaningful interactions and the benefit of our experience, while we get to know your finances (and you) inside out. This in turn enables us to best serve you.

Most of our clients choose to engage us on an ongoing basis, through our Private Client Offering.

This is ideal if you are:

- Looking for your adviser to provide regular feedback on your investments and ensure that the strategy matches the degree of risk and volatility you are prepared to accept
- Seeking a holistic approach to financial planning and wish to engage with a professional adviser on an ongoing basis to establish and achieve your goals and objectives
- Looking for an ongoing review process to map progress and respond to changing circumstances
- Wanting your adviser to proactively introduce new ideas and opportunities

Next of Kin Service.

This is an element of our service which many clients value highly, largely because of the peace of mind that it provides. In the event of your death, or if you are an executor of a will, we work with you and/or your executors and help you facilitate necessary financial arrangements. At such times of turmoil and change, often exacerbated by emotion and upset, we aim to provide a calm, dependable and supportive service.

Clients greatly appreciate the peace of mind that comes from knowing their partners, children and other dependants will be properly looked after throughout their lifetime and beyond.

Experience shows us that a calm approach and clear, timely communication between the many parties involved can be the key to ensuring the the right outcomes including the completion of probate as smoothly and speedily as possible.

We work with you and/or all other professional advisers to ensure all parties are speaking the same language, have access to all required documentation and share an understanding of what's needed and the timeframe.

We liaise with providers of any relevant plans to ensure payments are made accurately and in a timely fashion, helping to expedite payments from pension plans and death benefits.

Get in touch

At AWS Advice, our skilled team work hard to help create, grow and preserve your wealth, delivering a highly personal service. Our intention is always to add real value to our clients' financial matters.

If you'd like to learn more about how we may help you, please get in touch:

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