

# Investments & Pensions

## Do you need a Review?

### Investments & Pensions

We offer regular reviews both of your investments and pensions to ensure that they continue to meet your changing needs and to make the most of choices in the investment market.

Many individuals have several different pensions from previous employment and business ventures; indeed some pensions are often forgotten or ignored.

Investments, including funds held within pensions, can be diversified into a wide range of investment styles to suit your attitude to risk.

We can take clients through the investment and pensions maze and explain:

- Where and how these funds are invested?
- How they fit with your attitude to risk?
- Whether more suitable funds are available and appropriate?
- Why a review of the holdings is a good idea, especially for future needs and tax efficiency?

***Adler Financial Planning removes uncertainty in a world of investment and pension complexity.***



*For contact details please see over*

**For more information**

please contact one of our Financial Planning team on  
**0121 764 5500**  
or email [financialplanning@adlerinsurance.co.uk](mailto:financialplanning@adlerinsurance.co.uk)

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