

# *Financial Planning for your employees*

*A highly valued  
employee benefit  
that can make a real  
difference to your  
senior executives and  
key employees*



# Financial advice - A highly valued employee benefit

Avantgarde is a tailored financial advisory service which is aimed at UK employers who want to provide a bespoke financial solution for their top managers and high earners.

At the heart of any successful business lies a core of senior executives and key employees. They collectively focus on achieving your strategic and operational goals with the aim of driving your business forward. Very often that level of intense focus can mean that their individual personal finances can become neglected or indeed completely overlooked.

## What is Avantgarde?

Avantgarde is a tailored financial advisory service that has been specifically designed to bridge the gap between where your corporate benefits package ends and where astute financial planning should begin.

## Enhancing your employee corporate packages

Research confirms that enhanced employee performance can be achieved when executives gain a better understanding of what their long term financial future could be and when they are given the appropriate tools to achieve a better financial outcome. This is exactly why Citimark have developed our Avantgarde service.

## Citimark: How can we make a difference ?

Citimark is a Chartered independent financial planning practice. Our Avantgarde service is totally advice driven and delivered by Citimark's team of highly qualified financial planners. They are adept at identifying financial objectives and will develop a personal strategic plan which will show areas where real and tangible improvements can be made to your employee's current financial position. It's an outcome that works for you and your employees.

Citimark have already pioneered this service with one of the world's largest software companies and are very successfully advising it's key employees to achieve their lifetime goals and aspirations.



## How does Avantgarde work?

We offer an initial free of charge discovery meeting to understand your employee's objectives and assess their current position. Depending on their individual circumstances we should then be in a position to provide a bespoke end to end financial planning service.

Our expert chartered financial planners take great pride in building professional yet very personal relationships with your selected employees – always in strict confidence and totally focussed on achieving their life goals.

For your top executives we can offer confidential one to one consultations within your own office locations or alternatively at our offices in Bristol and Reading.

## Key Employer Benefits

- Employees become more psychologically positive and motivated (we build their lifestyle plan based on longer term strategies)
- Employees become more life confident resulting in higher performance and productivity
- Educational Programs included in your tailored package
- No contract cost to you, the employer
- All liability for advice is covered by Citimark through our professional indemnity protection

# How Avantgarde can help your employees

Citimark's Avantgarde financial advice and planning service can help your employees to:

- Become better financially organised
- Plan to fulfil their goals and aspirations
- Minimise the tax they pay in future
- Identify major potential savings in their financial affairs
- Analyse their corporate benefits package

*"We direct Citimark towards employees who are 10 and 15 years from retirement. We target high net worth individuals with large funds or high earnings who need a thorough, in depth planning service... We are in the business of software not pensions!"*

Vance Kearney, Oracle HR EMEA

## Get in touch

Find out how we can add real value to your employees, simply contact us or for more information please visit our Avantgarde section on our website:

**01275 462 469 (Bristol)**

or

**01183 593 250 (Reading)**

[www.citimark.co.uk](http://www.citimark.co.uk)  
[info@citimark.co.uk](mailto:info@citimark.co.uk)

*"We offer employers a specialist financial advice service aimed at you the employer; your senior management and high earning individuals. It's a truly rewarding challenge helping employees with busy lives and hectic schedules to plan their financial future."*

Mark Inledon  
Chief Executive Officer

*"Our primary objective is to introduce a financial awareness program to allow our employees to make well informed decisions about their financial future. Since 2011 Citimark have complimented our communications & employee benefit consultants to deliver detailed one to one advice to our senior executives and key employees. The feedback has been extremely positive."*

Michelle Bradshaw  
Oracle Compensation and Benefits Director  
at Oracle UK, Ireland and Israel

*Discover your  
Financial Future.*

*Discover  
Citimark.*



AVANTGARDE

The Citimark Partnership is authorised and regulated  
by the Financial Conduct Authority.

The value of an investment and the income from it could go down  
as well as up. The return at the end of the investment period is not  
guaranteed and you may get back less than you originally invested.

The Financial Conduct Authority does not  
regulate tax advice.



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