
WESTGATE

WEALTH MANAGEMENT

PARTNER PRACTICE OF



ST. JAMES'S PLACE
WEALTH MANAGEMENT

Westgate Wealth Management Ltd is a Partner Practice of St. James's Place Wealth Management – one of the top UK Wealth Management companies.

We offer a holistic service of distinct quality, integrity, and excellence with the aim to build a professional and valuable relationship with our clients, helping to provide them with security now, prosperity in the future and the highest standard of service in all of our dealings. We assist you in meeting your personal financial goals both in the short and long term, regularly reviewing your plans, ensuring these remain effective in the future, no matter how your circumstances change.

We understand the nature of your profession may give rise to more complex and unique requirements regarding your financial planning needs, such as fluctuating income and aged debt. We provide a bespoke service that comprehensively addresses your distinct circumstances, as a barrister, providing a simple means of securing your financial well-being, in areas including:

- Protection;
- Mortgage Advice;
- Investment Planning;
- Retirement Planning;
- Inheritance Tax and Estate Planning,
- Health Care Planning.

Your home may be repossessed if you do not keep up repayments on your mortgage.

The value of an investment with St. James's Place will be directly linked to the performance of the funds you select and the value can therefore go down as well as up. You may get back less than you invested.



Trusts are not regulated by the Financial Conduct Authority.

If you require further information, or to arrange a no obligation review, please contact **Kaye Crush DipFA**, Director of Westgate Wealth Management:

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The Partner Practice represents only St. James's Place Wealth Management plc (which is authorised and regulated by the Financial Conduct Authority) for the purpose of advising solely on the group's wealth management products and services, more details of which are set out on the group's website at www.sjp.co.uk/products. The 'St. James's Place Partnership' and the title 'Partner Practice' are marketing terms used to describe St. James's Place representatives.