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# Sapphire

## Diversified wealth management strategies for the sophisticated investor

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Sapphire is designed for clients who want a degree of hands on involvement with their financial plans and their execution. Sapphire wealth management strategies strike the perfect balance between personal control and professional support.

Sapphire clients typically have an advanced understanding of investment principles, including the importance of balancing risk and opportunity and an appreciation of different asset classes. As part of their bespoke wealth management strategy they are often personally introduced to discretionary fund managers where appropriate. Our service may also include introducing clients to other professional advisers such as solicitors, accountants and property managers.

Sapphire offers a highly effective diversified investment strategy coupled with expert advice and support in other areas combining to achieve a genuinely hassle free service.

### The Sapphire Client Service

Annual review meeting	A complete review of your financial strategy The Crawford Consulting Financial Health Check
Ongoing strategy and review meeting	One available each year To include a review of paperwork and financial offers
Unlimited telephone and email access to your adviser	Direct line: 01603 219742 Email: paul@crawfordconsulting.co.uk
Foresight service	Proactive identification of investment opportunities or risks
Portfolio management service	Portfolio monitoring Rebalancing of asset allocation Up to two portfolio valuations each year
Risk monitoring service	Regular reviews of your attitude to risk Regular assessment of the risk profile of your portfolio
Information service	Provide information on specialist areas such as self-invested personal pensions, enterprise investments schemes, venture capital trusts as appropriate Provide generic research
Professionals service	Recommend suitable professionals as appropriate
Inheritance tax and estate planning service	Provide up-to-date information in relation to changes in legislation
Tax planning service	Work in conjunction with your accountant and other taxation advisers if required
File maintenance service	Ensure essential records are kept up-to-date