

At Bright Wealth Management, our philosophy is designed to help you through life's **financial journey**.



Wealth Management



Perry Beevor
FINANCIAL ADVISER

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Perry has more than 20 years' experience of working in Financial Services, in a range of roles, all at customer facing level:

- Experience in core advice areas e.g. Wealth advice
- Achieved London Institute of Business and Finance Diploma level 4 and holds the Statement of Professional Standing
- Has a network of specially selected experts to support your advice needs
- Specialises with private individuals
- Interests in family and Golf

Specific Skills:

- Investment and pre-retirement planning
- Near and post retirement planning
- Pension switching *
- Inheritance Tax Planning

Perry has been our adviser now for over 13 years, in that time both my husband and I have found him to be professional, reliable and honest. We have and would certainly continue to recommend him to other people looking for sound financial advice.

Mr & Mrs Blake - Rushden

Perry has been very helpful throughout what I have found to be the complicated subject of pensions. Perry understood my concerns, explained the jargon, the fees involved and offered me sound advice throughout the process. He handled the transfer of my pension fund which allows flexibility should I need to access further monies from my fund. I am pleased with the manner in which Perry conducted himself – a true professional. I would certainly recommend him to any of my friends who require sound financial advice.

Ms Rose Thomas - London

* Transferring out of a Final Salary scheme is unlikely to be in the best interests of most people.