

Wealth Planning- 10 tips for Brits or those moving to the UK



Speakers:

Simon Parfitt, Directors, Pymont Wealth Management

Tom Rogerson, Directors, Pymont Wealth Management

Wealth Planning - 10 tips for Brits or those moving to the UK

During this educational session, two experts from Pymont Wealth Management will discuss their top 10

Wealth Planning tips for being optimised, tax-efficient and appropriately structured with your wealth.

The speakers will include points on UK Inheritance Tax, the use of financing and leverage, planning with property, sensible investment management and UK Capital Gains Tax.

This will be a useful discussion for those that are British, have assets in the UK or are thinking of moving to the UK.

About the speakers



Simon has been in financial services for nearly 15 years, having started his career in Amsterdam before moving to Hong Kong in 2012 where he is now co-owner of Pymont Wealth Management.

He is an advocate of "Life Centred Wealth Management" and a firm believer in the value of proper financial planning – not just the selling of financial products!

He is a regular contributor and panellist on Financial Planning matters in Hong Kong.



Tom has been a Financial Planner in Hong Kong for over 10 years, moving to Pymont Wealth Management in 2021.

Tom is qualified in both Hong Kong and the UK and is one of the few Certified Financial Planners in Hong Kong.

He's a firm believer in the value of delivering real financial planning to clients, moving the conversation from products to process and helping families achieve the life that they desire.

Pricing

- Member: HK\$140
- Non-Member: HK\$250

Details on how to join will be sent via email by 5pm the day before the webinar.

Terms & Conditions

- Reservations in advance are required. Please consider your booking confirmed unless notified otherwise.
- Cancellations must be made in writing 24 hours prior to the event. No shows will be charged.
- This event is closed to the media.
- The event will be cancelled if the No.8 Typhoon signal or the Black Rain Storm warning is in force.
- By attending this event, you agree to be photographed, recorded, and/or filmed and give permission to use your likeness in promotional and/or marketing materials.
- For further information please email catherine@britcham.com
- All payments for this event need to be settled by

credit card through PayPal. Please note you do not need a PayPal account to complete payment.