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YOUR WEALTH. OUR EXPERTISE. ONE PRIVATE OFFICE.

As wealth grows, so too does the complexity of managing it. This requires a coordinated approach that protects today's success while shaping tomorrow's legacy.

We partner with our clients to help them navigate that complexity, acting as trusted advisers to individuals, families, and businesses, with significant wealth. From protecting and structuring wealth to planning for future generations, we provide advice designed around each client's unique aspirations, values, and legacy.

Acting as the central point of coordination, we work so that every decision is aligned, every structure has purpose, and every action supports your broader objectives. Our focus is not simply on performance, but on providing you with the confidence that your affairs are organised, understood, and actively managed over time.

Above all, we view our role as one of long-term stewardship. As circumstances evolve, across markets, jurisdictions, and generations, your strategy is refined accordingly, with quiet oversight and careful execution at every stage.

Our Private Office provides a considered and complete approach to managing wealth, one that reflects the long-term nature of our clients' affairs. Whatever journey you are on, as a certified B-Corporation, we believe that a modern Private Office should create lasting value; for our clients, their families, and the wider world.

PRIVATE OFFICE

True independence is fundamental to the Private Office model. As an employee-owned firm, our advice is shaped solely by the interests of our clients, free from external ownership, product bias, or institutional influence.

Directly authorised and regulated by the Financial Conduct Authority, we maintain unrestricted access to the market rather than operating within a restricted advice framework. This allows us to evaluate opportunities objectively and provide recommendations based on what is most suitable for your individual circumstances and aspirations.

We provide comprehensive oversight of your financial affairs, ensuring that each aspect is coordinated. This includes strategic advisory, wealth planning and structuring, estate and succession planning, offshore bond expertise, banking and lending organisation and governance support. In addition, we will oversee external legal, tax, fiduciary, and specialist partners where needed.

WEALTH PLANNING AND STRUCTURING

INVESTMENT ADVISORY

BANKING AND LIQUIDITY MANAGEMENT

RISK MANAGEMENT AND PROTECTION

GOVERNANCE, SUCCESSION AND LEGACY PLANNING

BUSINESS OWNERS AND ENTREPRENEURS

PROPERTY AND REAL ESTATE ADVISORY

PROFESSIONAL OVERSIGHT

PRIVATE OFFICE

WEALTH PLANNING AND STRUCTURING

We provide strategic advice on the legal, tax, and ownership structures that support the preservation and management of wealth. From trust arrangements and family investment companies to international structuring and asset-holding vehicles, we help safeguard wealth so that it is organised efficiently, protected appropriately, and positioned to meet future objectives.

INVESTMENT ADVISORY

Providing oversight of your investment portfolio, we monitor it, so that it is aligned with your objectives, risk profile, and liquidity requirements. This encompasses asset allocation, portfolio design, manager selection, and ongoing performance review. We also advise on direct and alternative investment opportunities.

BANKING AND LIQUIDITY MANAGEMENT

We will review your banking relationships and lending arrangements as part of a coordinated balance sheet. This includes structuring borrowing, managing liquidity, and ensuring that cash and credit are deployed efficiently, with appropriate diversification across counterparties.

RISK MANAGEMENT AND PROTECTION

When assessing and managing the risks associated with your financial position, we will confirm that appropriate protections are in place. This includes insurance structuring, liability management, and contingency planning, providing resilience against unforeseen events.

GOVERNANCE, SUCCESSION AND LEGACY PLANNING

Preserving a legacy extends beyond the transfer of assets. We support clients in developing governance frameworks, succession strategies, and long-term plans that reflect their personal values, family circumstances, and wider aspirations. Whether wealth is intended for future generations, philanthropic initiatives or causes of lasting importance, we help create structures that provide lasting impact.

BUSINESS OWNERS AND ENTREPRENEURS

For business owners and entrepreneurs, your company is linked to your overall financial position. We work closely with you to understand this relationship and reflect it fully within your broader strategy. We also support corporate arrangements and succession planning, including management buyouts, employee ownership trusts and incentive schemes for key staff.

PROPERTY AND REAL ESTATE ADVISORY

We provide guidance and oversight on the acquisition and structuring of property and other real assets. This includes ownership structuring, financing considerations, and working with relevant advisers, ensuring that these assets are managed as part of your overall strategy.

PROFESSIONAL OVERSIGHT

Working alongside legal, tax, and other specialist advisers, as a central point of organisation across your professional network, we make sure that our advice is aligned and that implementation is carried out efficiently.

SERVICE ARCHITECTURE

We provide different service routes, tailored to the level of support and scope of advice that you require.

FULL ADVISORY

Full Advisory is the foundation of our client relationships and the way in which we work with most individuals, families, companies, and entrepreneurs. This approach provides both initial and ongoing advice through a long-term relationship built on trust, continuity, and a detailed understanding of our clients' wider financial position. We deliver coordinated advice, adapt to changing circumstances, and support better decision-making over time.

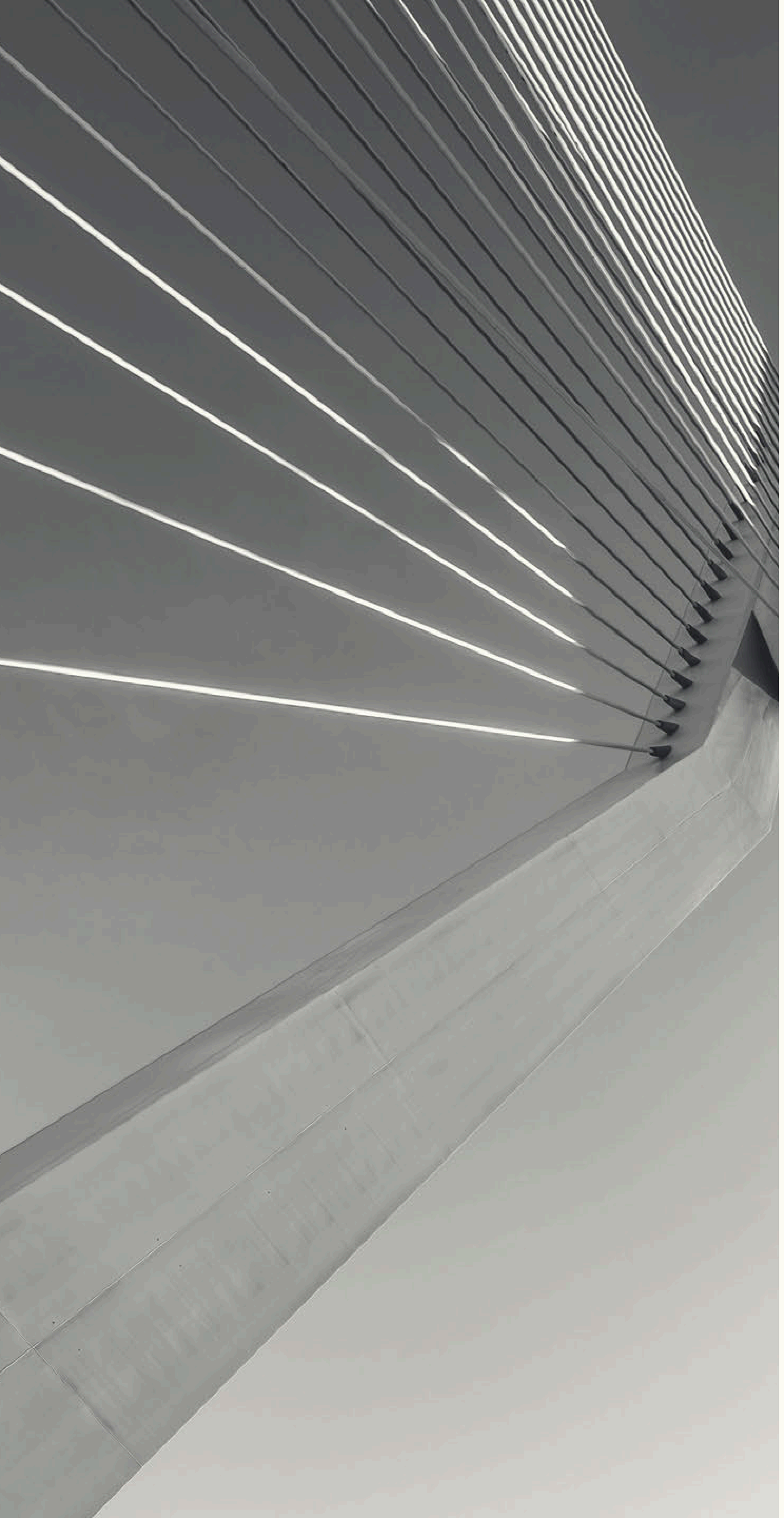
We use different service levels to reflect the differing requirements for planning, complexity and oversight. This allows us to support clients, their family members, and future beneficiaries through every stage of wealth creation, preservation, and legacy planning. While the level of service and personalisation varies, the scope, quality, and independence of our advice remain the same.

SPECIALIST ADVISORY

Specialist Advisory is available for clients requiring advice on a specific matter, transaction, or area of planning.

These engagements are typically narrower in scope and focused on a defined requirement or objective. While clients benefit from the same technical expertise and attention to detail, the service is generally delivered on a standalone basis rather than through an ongoing advisory relationship.

Where appropriate, Specialist Advisory engagements may later develop into a broader long-term relationship through our Full Advisory service.

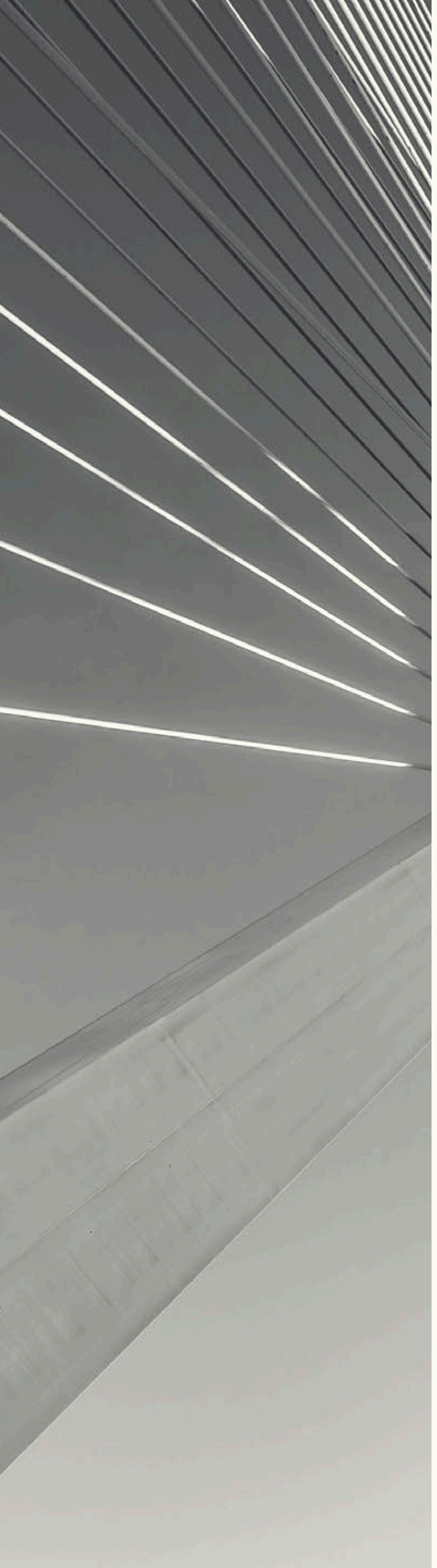


SERVICE LEVELS

Whilst your accumulated wealth is usually a reliable indicator of your needs and which service level is most suitable for you, this won't always be the case. The most appropriate service level will depend on your individual circumstances, objectives and advisory requirements.

Regardless of the service route selected, your relationship will be led by a dedicated Partner who serves as your trusted adviser within the Private Office. With a thorough understanding of your circumstances, objectives and priorities, they provide continuity of advice and act as the central point of coordination across your wider advisory team.

Our Partners bring experience spanning financial planning, law, insurance, investment banking, and trust corporation services. In addition to advising clients and families, they have acted in fiduciary capacities, providing first-hand experience of the responsibilities involved in preserving, administering and transferring wealth. This breadth of expertise enables them to provide informed guidance and coordinate the specialist support required to achieve your objectives.



PRIVATE OFFICE

For clients requiring a fully integrated private office.

A highly personalised private office service delivering strategic oversight across every aspect of your wealth. As your trusted adviser, we coordinate specialist expertise, align professional advisers and provide continuity across investments, structures, jurisdictions and generations, ensuring decisions are made within the context of your broader objectives and legacy.

PRIVATE

For clients seeking integrated wealth management.

A dedicated advisory service for those focused on preserving and enhancing their wealth over the long-term. We provide ongoing guidance across investment strategy, wealth planning and risk management, while coordinating specialist advice where needed so that decisions remain aligned with broader financial and family objectives.

STRATEGIC

For clients requiring structured ongoing advice and planning.

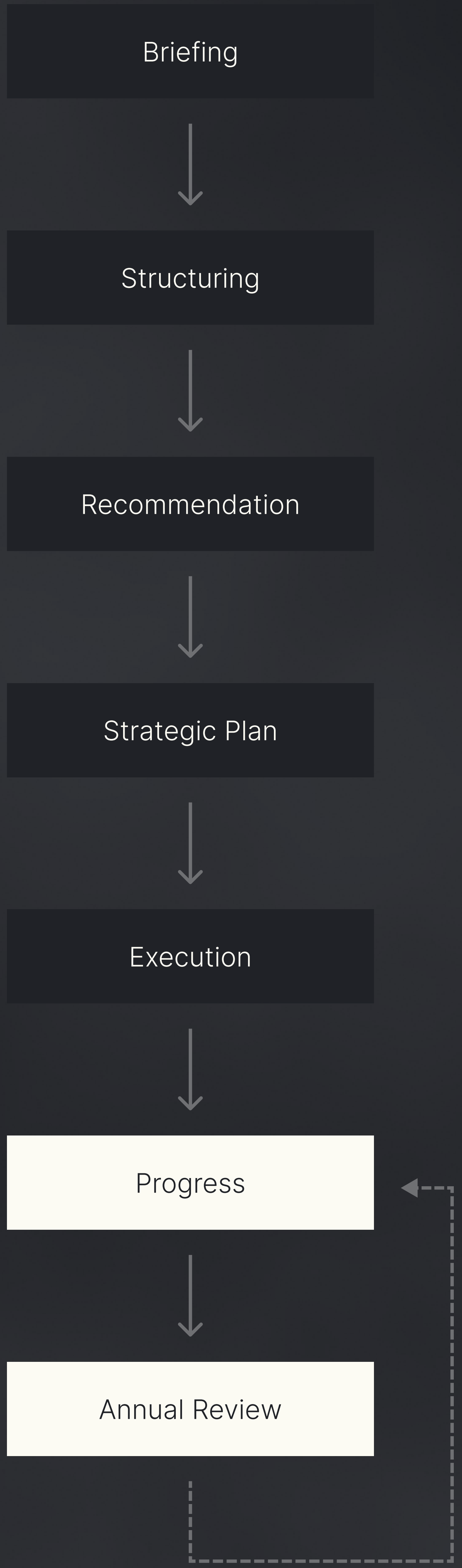
A focused wealth planning service bringing structure and confidence, with personalised financial planning, lifetime cashflow modelling and ongoing guidance. We provide a clear framework for achieving your objectives while making the most of available tax and planning opportunities. As your needs evolve, it also offers a natural introduction to our wider capabilities.

TRUSTED ADVISORY NETWORK

We will work closely with your existing professional advisers or introduce trusted specialists from our carefully curated network. Each relationship is selected for its expertise, discretion, and ability to support the unique needs of private clients and their families.

Acting as a central point of oversight, we work together with your other advisers in concert rather than in isolation, creating a coordinated approach that supports informed decision-making, continuity of strategy, and the effective stewardship of wealth.

- Legal and Tax
- Lending and Insurance
- Fiduciary and Administration Services
- Banking, Property and Lifestyle



ENGAGEMENT

Once appointed, we will quickly develop a comprehensive Strategic Plan that serves as the foundation for our work together.

Through a long-term advisory mandate, we provide continuous oversight ensuring your affairs remain aligned with your objectives over time.

BRIEFING

A private discussion to understand your current position, priorities, and longer-term objectives. This forms the foundation for all subsequent structuring.

STRUCTURING

Discussing your circumstances in more depth, we get to know more about your current position, which is used to design a tailored strategy, coordinating across all areas.

RECOMMENDATION

We present our advice in full, outlining the proposed strategy and key decisions. This stage ensures complete alignment before proceeding.

STRATEGIC PLAN

A formal articulation of the agreed approach, including structuring decisions and the pathway to implementation.

EXECUTION

On agreement, we move to execution, implementing the strategy and coordinating with any relevant product or service providers, while maintaining oversight throughout.

PROGRESS

Ad hoc meetings and discussions are held as required, whether in response to opportunities, changes in circumstances, or specific areas requiring attention.

ANNUAL REVIEW

A formal annual review with ongoing analysis, guidance, education and advice, ensuring the structural effectiveness of your plan and alignment to your financial goals.

DISCLOSURES

We believe important information should be presented clearly, not hidden in small print. The following sets out our regulatory disclosures.

Aventur Wealth Limited is authorised and regulated by the Financial Conduct Authority (FRN 968770).

This content is for information purposes only and does not constitute financial advice. For personalised advice, please speak to an Aventur adviser. It is neither an offer to sell, nor a solicitation to buy, any investments or services. It does not constitute a personal recommendation and does not take into account the individual financial circumstances, needs or objectives of the recipient. We are not legal or tax advisers and do not provide legal or tax advice. Tax treatment depends on your individual circumstances and may change.

The Financial Ombudsman Service is able to mediate complaints that clients and financial services businesses are not able to resolve themselves https://www.financial-ombudsman.org.uk

The value of investments can fall as well as rise and you may get back less than you invested. Past performance is not a guide to future performance.

Wills, Lasting Powers of Attorney, Trusts, Estate Planning, Tax Planning and Lifetime Cashflow Modelling are not regulated by the Financial Conduct Authority.

You may be able to claim compensation from the Financial Services Compensation Scheme if we can't meet our obligations. The amount of compensation available will depend on the type of business and the circumstances of the claim. The level of protection depends on the type of business and the rules applying at the time.

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