



Introduction to Jane

Jane lives and works in London although now she happily devotes a lot of her time to her grandchild. Like many parents, Jane was not sure how to help her children financially, without sacrificing the things she wanted to do for herself. Her stockbroker could not give Jane the clear, impartial and thoughtful advice she needed, which is why she appointed Edison.

“I wanted a more modern approach and that’s what I found with Edison.”

Jane’s Story

“My solicitor told me about Edison. She said they were very good, so I went to see them and liked their approach straight away. I was also getting fed up with my stockbroker. I wanted a more modern approach and that’s what I found with Edison.

They are much friendlier and more approachable and that makes me feel more comfortable. I feel they all take a lot of care of me. In particular, I wanted some help with planning for my children’s and grandchildren’s futures. Edison took the time to talk through different ideas and options, which made it all clear and straightforward. There was never any rush and I remember coming into their office lots!

Jane's Story (cont.)

So, gradually I've started passing money down and it's helping my family much more now than it was simply growing in my portfolio. What's also great is that Edison regularly test my financial position to make sure I'm never giving away more than I can afford. That's very reassuring. There's also the fact that they're (a bit!) younger. Having a younger firm who connect with my children as well as me makes things so much easier too."

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For a straightforward conversation, call us on 020 7287 2225 or email hello@edisonwm.com.