EVA WEALTH

Chartered Financial Planners

Stronger together.

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About us

Eva Wealth Management for Women helps women understand and deal with the unique financial challenges they face. As women often think differently to men about money, and typically face different challenges, they need a financial planner who understands this.

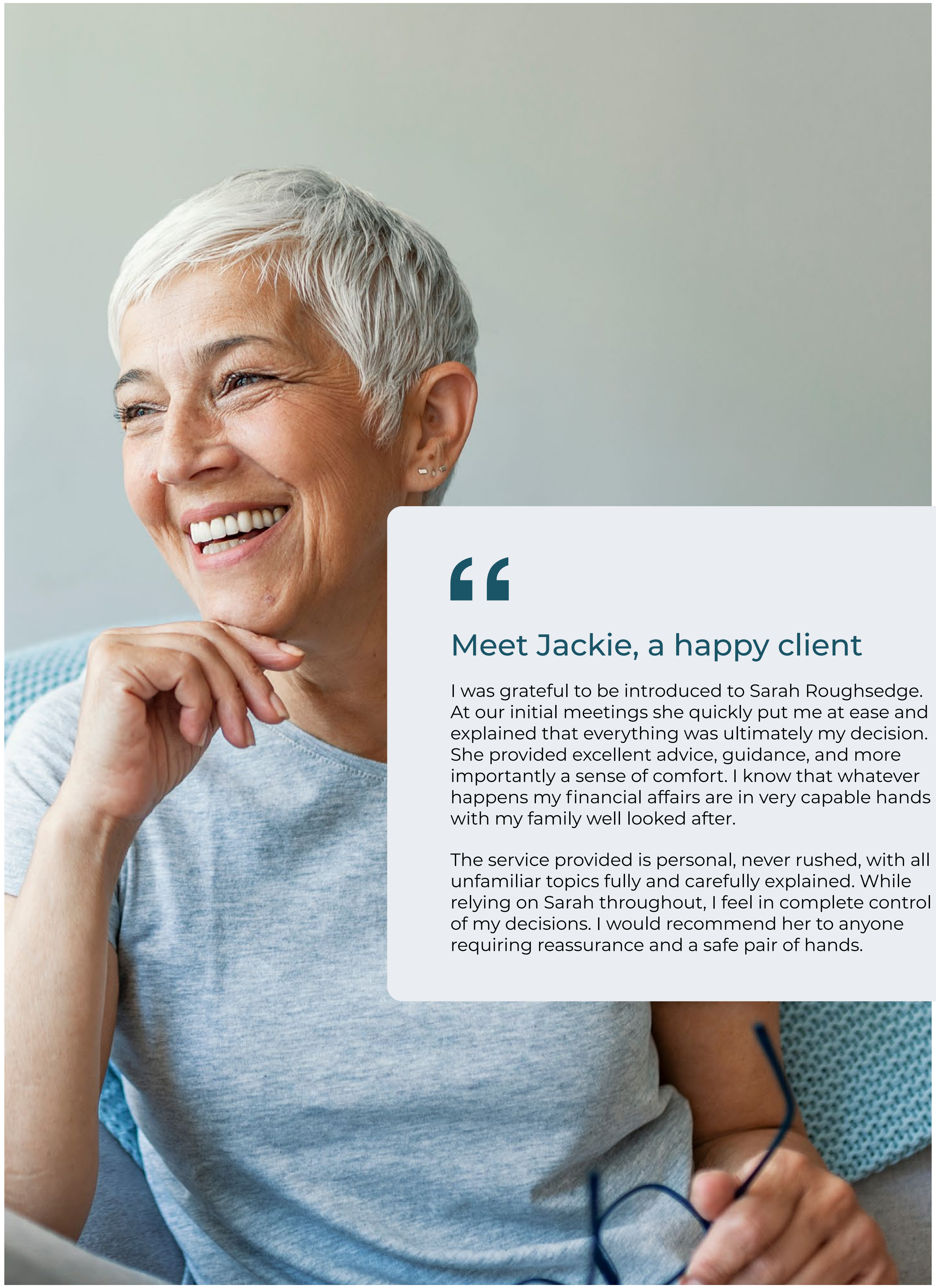
Eva works in a way that gets to the heart of your financial goals, providing individually tailored strategies that deliver the best outcomes for you.

As part of Clarus Wealth, an independent financial advice practice with roots dating back 30 years, Eva shares its commitment to trust, honesty and exceptional client service.

As Chartered financial planners, we help women from a wide range of backgrounds, including businesswomen, divorcees, widows, and those looking to take back control of their finances whether they are planning for, or transitioning between different life stages.

We can help with a myriad of financial needs, including:

- Investments and portfolio management
- Tax efficiency
- Mortgages
- Life insurance and financial protection
- Retirement planning and pensions
- Inheritance Tax (IHT) and estate planning
- Long-term care
- Pension withdrawal management
- Income generation



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Meet Jackie, a happy client

I was grateful to be introduced to Sarah Roughsedge. At our initial meetings she quickly put me at ease and explained that everything was ultimately my decision. She provided excellent advice, guidance, and more importantly a sense of comfort. I know that whatever happens my financial affairs are in very capable hands with my family well looked after.

The service provided is personal, never rushed, with all unfamiliar topics fully and carefully explained. While relying on Sarah throughout, I feel in complete control of my decisions. I would recommend her to anyone requiring reassurance and a safe pair of hands.

Who we work with

Many women find it difficult to know where to start with financial planning. Whether you're thinking about retirement, have money to invest or have inherited investments, or you just want to be more tax-efficient, knowing who to approach and trust can be tricky.

As Chartered financial planners who specialise in working with women, you can be assured we will take the time to fully understand your needs and unique circumstances. Furthermore, we understand the financial challenges many women face, so will use our expertise to provide tailor-made solutions and guide you through life so that you can achieve your goals.

Divorcees

Planning for your financial future on your own after a divorce can be difficult, whatever stage of life you are in.

Not only will your immediate financial situation likely change, but if you also intended to rely on your ex-spouse's pension in retirement, divorce may put your long-term financial security at risk.

We will help you understand your financial situation over the short and long term and the options available to you to empower you to provide a brighter and more secure tomorrow.

Widows

The prospect of taking responsibility for the family finances after a spouse or partner's death is likely to be a daunting prospect at an already difficult time in life.

At Eva, we are experienced in helping women better understand their financial position and help you gain clarity and control over your finances, working with you over the long term as you look to move ahead in your future planning.

Planning for retirement

While women typically live longer than men, they often have smaller pensions than their equivalent male peers, as they are more likely to take career breaks to look after children or elderly relatives

As specialists in financial planning for women, we understand the challenges you face. We'll develop a bespoke retirement strategy that will help you enjoy the retirement lifestyle you want.

Key Life Stages

Transitioning through key times in life's journey can be more comforting when you know you have an expert professional partner who understands you and your journey.

We combine our experience of the challenges faced by women, our expertise and use of clear language to provide a valuable partnership.

Whether you are transitioning through your career, retirement, or changes to your personal life, we seek to give you the confidence to take charge of your future.

Businesswomen

Whether you are a CEO of a successful company, selling your business or launching a new one, the financial challenges you face can be better navigated when you have an experienced adviser alongside you.

Although women are increasingly the household's breadwinner. many women still earn less and have smaller pensions than men. That's why creating a bespoke financial strategy that understands your life and secures your financial future is essential.

At Eva, we help you turn your career success into long term financial security and the lifestyle you want to create for yourself.

Wherever in life's journey you are, working together in partnership ongoing means we can provide regular support with your financial plan allowing for any unexpected twists and turns along the way and helping you make sure you stay on track.

What sets us apart

Our women-focused financial planning, which is dedicated to delivering bespoke financial planning and investment strategies designed around you, sets us apart from normal advice services.

We will always be on hand to guide you through the complex world of finance, pensions and wealth management, so that you can live the life you want.

Financial plans as individual as you

Research has shown that women typically manage wealth in a different way to men, which is something we understand. This is not about "right or wrong", it's about finding a way of working that is right for our clients.

As we get to know you as a person, your holistic financial situation, and your goals, you'll benefit from a strategy that works for you.

An atmosphere of respect

While some women may be more risk-averse when it comes to their finances, there are many women who are more "risk-aware". This means they will want to ask more questions and satisfy themselves that they have considered everything before making financial decisions.

When you work with us, we want you to ask questions in comfort, without feeling you are being intimidated or belittled for doing so. You'll feel listened to and understood, while gaining valuable clarity about your finances.

Meeting your financial objectives ethically

Investing in responsible and ethical funds can help the planet and can help provide better outcomes for you over the long term. It can also help future generations.

If it's suitable for you, our investment solutions seek to place an emphasis on sustainability. As whole of market advisers, you can be assured we will select the most appropriate investment strategy for you and are not restricted to individual providers or approaches.

A tried and trusted approach, backed by evidence

Rather than potentially losing a significant part of your wealth to high charges, working with us gives you access to a low-cost, diversified and evidence-based investment approach.

You'll benefit from 100 years of empirical data, academic research by renowned economists and the practices of leading institutional investors. This allows us to design solutions that help you to achieve your goals at a level of risk that is suitable to you.

Value for money

You want to know that you're getting real value from your financial planner. So, we are transparent about our fees from the outset, so that there are no surprises later on. Our advice is always clear and confirmed in reports that are written in plain English – including the fees.

You will always know what our fees are before you decide to proceed with us, and charges are only ever applied once we have agreed in writing the work we will be undertaking on your behalf.

Making life easier for you

Getting joined-up advice from professionals can add real value. That's why we are happy to accompany you if you have meetings with tax or legal specialists.

This ensures every aspect of your situation has been considered properly, and the way they dovetail into each other is worked into your bespoke wealth strategy.

We also recognise that our clients have busy lives, and could be travelling or juggling family and business commitments. So, we'll keep paperwork to a minimum and you'll always receive clear, concise communications.

Our 3-step process

Having a clear expectation when you deal with a financial planner helps you to understand what to anticipate when we work together.

Our simple three-step “explore, engage and evolve” process breaks each stage down into uncomplicated components to help you feel confident throughout the process.

Explore

You can expect us to ask lots of relevant questions so that we can really get to know you, your concerns and your goals. It’s not just about your money, it’s about your life, as this allows us to fully understand every aspect of your circumstances.

Engage

Now we know you and your goals, we create a comprehensive financial roadmap for your future. You can see how your plans, investments and wider wealth overlap and what the most effective strategy for you is. This is important, as often the whole is more than the sum of its parts.

Evolve

Life never stands still for long, so the best financial plans are designed to carry an element of flexibility. If your long-term goals need to change, so can your plan. This does not always mean changing your goal, just the road that gets you there.

Our clients therefore typically partner with us for the long term, as we journey the years together, ensuring your financial plan continues to move you towards fulfilling your goals.

Why clients work with us

Commitment to excellence service

We offer a high-quality, bespoke financial planning service for women. But don't take our word for it.

In March 2022, as part of Clarus Wealth, we received a Gold award from Investor in Customers (IIC) – the highest recognition of superb service.

As well as highly qualified independent financial advice, you also have the peace of mind that we have your best interests at heart.

Investor in Customers Gold 2022

Leaders in ethics and good practice

Eva is committed to sustainability, which is why we are Planet Mark certified. This allows us to measure and reduce our carbon footprint, while at the same time helping protect an area of endangered rainforest.

This also supports the Eden Project, which promotes education about the living world.

We are also members of the Financial Vulnerability Taskforce, a new independent representative body that covers the personal finance sector. This encourages proper behavioural attributes and it ultimately establishes good practice with consumer vulnerability at the fore.

PlanetMark

Financial Vulnerability Charter

Ongoing financial education

Providing ongoing financial education for clients is at the heart of Eva. That's why you'll have access to useful and practical blogs, webinars and other resources, where you'll find guides on a wide range of subjects, including investing and long-term care.

Furthermore, you can stay financially organised using our range of online tools. This provides you with financial peace of mind and helps you to stay on top of your finances.

ProfessionalAdviser WOMEN IN FINANCIAL ADVICE AWARDS 2022
HIGHLY COMMENDED
Financial Adviser of the Year-South West
Sarah Roughsedge, Clarus Wealth

Get in touch today

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> Sarah has been so great to work with. She is patient and makes this new world to me accessible without being patronising.