



CELTIC FINANCIAL
PLANNING LTD

We **unlock** your goals.

Our trusted multi-award-winning team creates robust and independent financial planning solutions to help you grow, protect and pass on your wealth. From building your investments to enjoying retirement and planning your legacy, we are here to support you every step of the way.



This is Full Financial Planning.

Financial advice shouldn't just be about numbers. We look at the bigger picture, from tax planning and investments to protecting your family or business, making sure your plans work together to help you live life on your terms.

Estate Planning



From protecting your wealth to ensuring it passes smoothly to future generations, we have over 50 years' experience in estate and legacy planning.

Protection Planning



We can help protect you, your family and/or your business, including life and critical illness cover, shareholder protection and private income protection.

Pensions & Retirement



From consolidating multiple pensions to maximising contributions and building flexible drawdown plans, our experts can help you create a retirement strategy tailored to your goals.

Care Fee Planning



Our independent later life financial specialists can provide helpful advice when it comes to mitigating the impact of care fees, or providing provision to meet the ongoing costs.

Savings & Investments



We provide tailored wealth management strategies designed to protect, grow and preserve your assets. From ISAs and Bonds to more complex investment structures, we work with clients investing wealth to create solutions aligned with their long-term goals.

Equity Release



We can help you weigh up the best way to release equity from your home to supplement your retirement income, or meet your other goals and objectives.

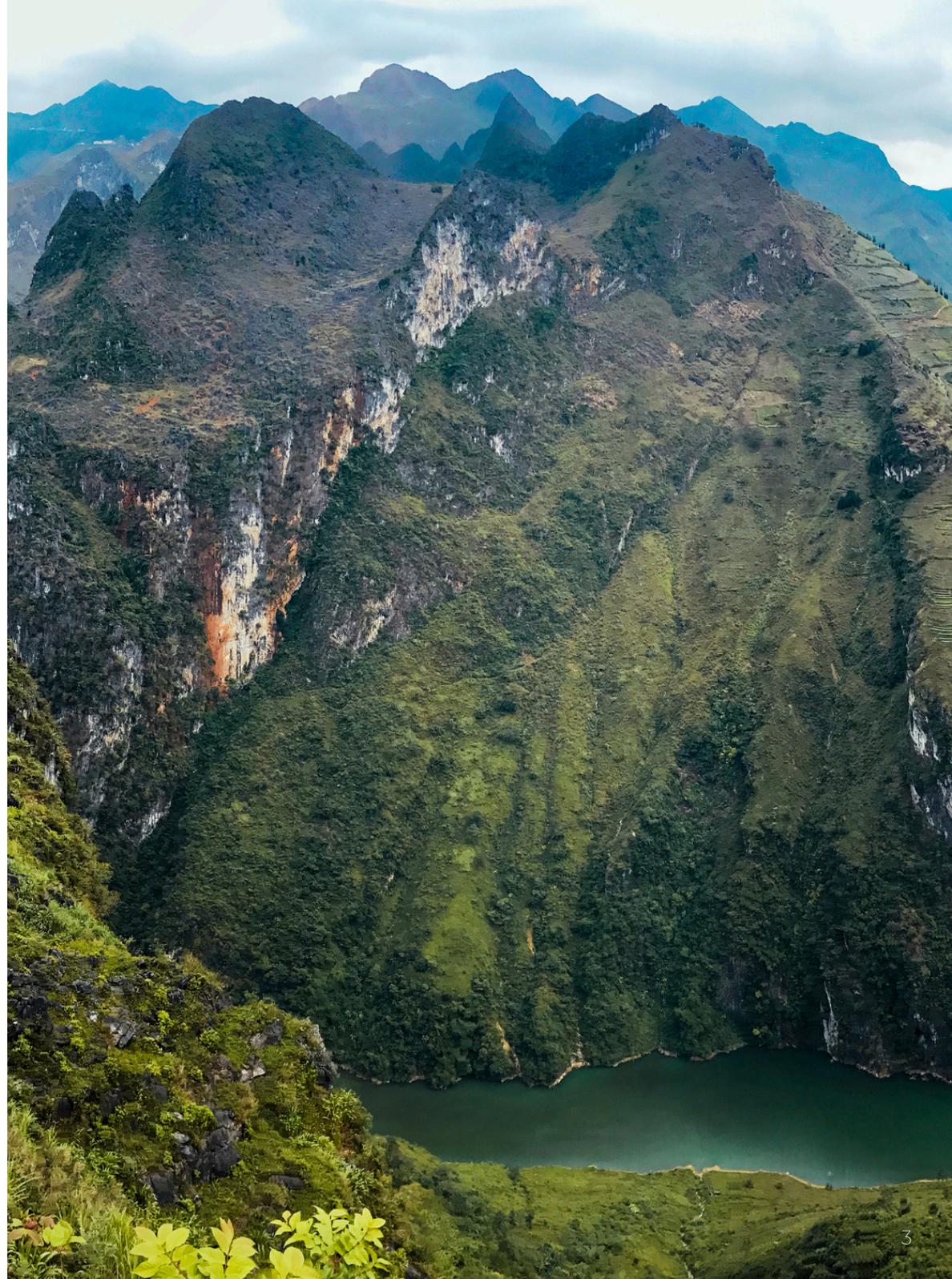
It's time to transform your future.

Celtic Financial Planning is a team of Chartered Financial Planners with a simple mission – helping you grow, protect and pass on your wealth, from building your investments to planning for a secure and comfortable retirement.

We treat our clients like family, offering honest, independent advice you can trust.



hello@celticfp.co.uk



Giving Back to Our Community.

Community is at the heart of Celtic Financial Planning. We support local charities and plant a tree for every new ongoing pension or investment client.

We are proud to be a carbon positive firm, offsetting more emissions than we generate.



A stylized illustration of a diverse group of people, including men and women of various ethnicities, dressed in professional attire. They are arranged in a group, with some in the foreground and others slightly behind, all looking towards the viewer. The background shows a simple office interior with a window and a door.

Forged by **honest, hard work.**

Our experienced team have been working together for many years helping clients across North Wales and beyond, delivering an unparalleled tailored service to meet your needs.

We've worked very hard to build a team that cares, works hard, and always listens to understand.

£170M
Assets Under
Influence

300 +
Families we
work with

100 +
Years of Combined
Experience



The **real value** of financial planning.

Watch our mini documentary on the real value of financial planning, the transformations that it can help you go through, and how to know when it's the right option for you.

[Watch now >](#)

How we do things



Establish Relationship

We offer a free no obligation review to establish how we can help, this includes fully discussing our fees and charges.



Collect Information

We spend time getting to know you and your circumstances, along with collecting information about existing plans.



Analyse

Based on your current objectives and needs we identify any shortfalls or gaps in your financial planning.



Develop Solutions

Based on your objectives and goals we produce our recommendation report and present it to you.



Implement

If you are happy with our recommendations and any costs involved we put them into force.



Review

If appropriate we provide ongoing advice and reviews to ensure the recommendations remain suitable.



Why work with us?



We're Independent

We are independent Financial Advisers, which means we have no restrictions on the providers we can recommend.



We're award-winning

We are a multi award winning firm, recognised for both the quality of our financial planning and the way we run our business with integrity, innovation and care.



Our Advice Promise

You can hold us accountable to our financial advice, which we promise will always be the best we can give.



Ready to **get started?**

We'd welcome the opportunity to have an introductory discussion with you

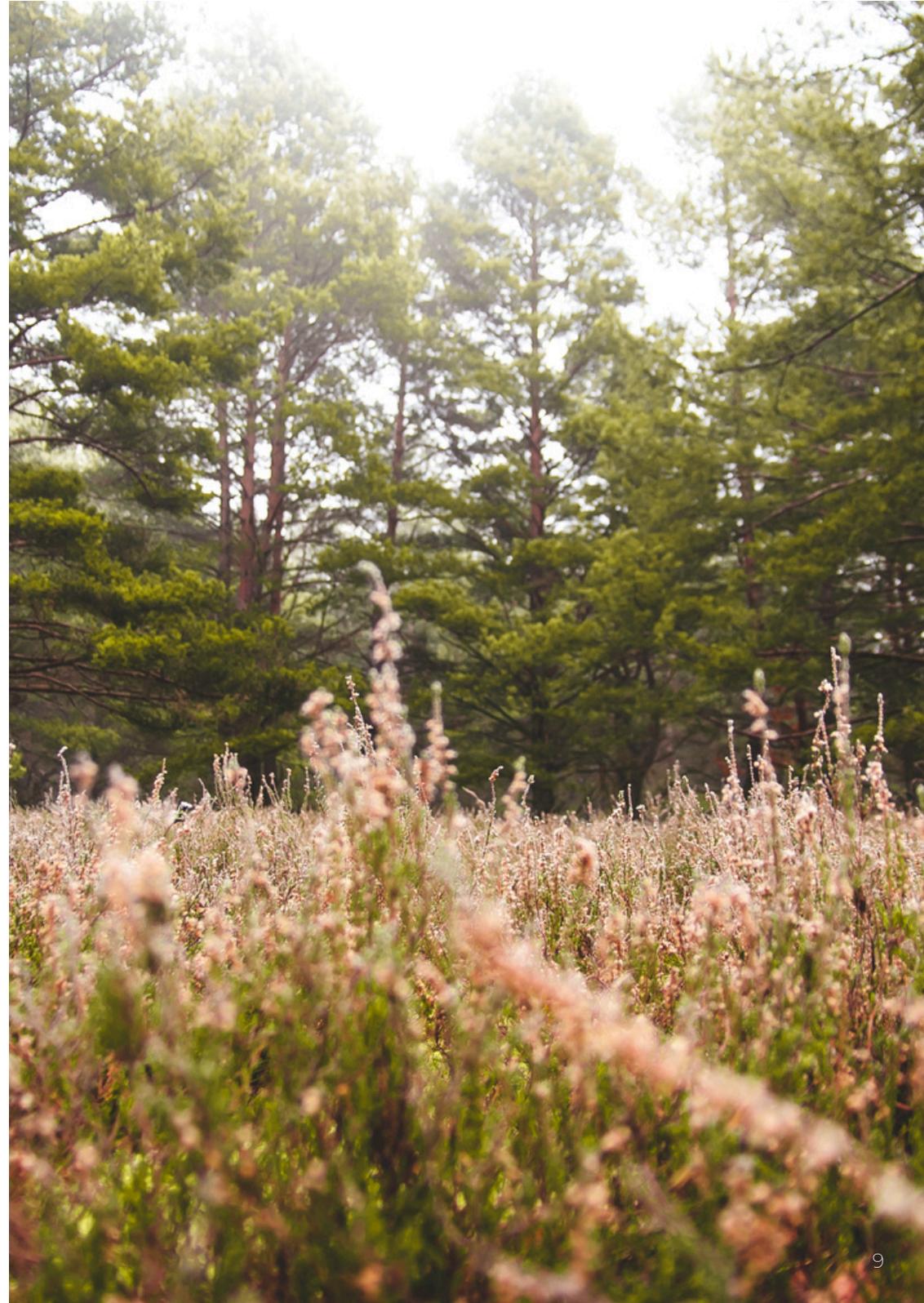
When you feel ready to get in touch, please contact us below:

 01352 390 121

 hello@celticfp.co.uk



Book a call with us





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