



# Good Green Money


Come On Board – Document 1 of 3:

## Our Brochure

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Socially responsible, **environmentally positive**, financial advice



## Who We Are

We are a specialist IFA firm helping the conscientious wealthy interested in investing ethically. Our typical client invests between £400,000 and £5,000,000 with us.

We are a single office, UK based business, located in the heart of the beautiful Lancashire countryside, but we service clients all over the UK, often visiting in person especially if there are good rail links, although we also hold many meetings online.

Our Founder, Haydon Waldek, has worked in financial services since the early 1990s and as a Chartered Financial Planner he has all the skill and expertise needed to run the business to a very high standard.

We are an 'independent' firm, and we are 'directly authorised' and regulated by the Financial Conduct Authority (FCA).

## Who We Help

The following list gives you an idea of **five broad categories** of clients who we would typically advise, with examples of the type of goals we often help with. Note, however, that this is just a rough guide and should you not fall neatly within one of them (say, you are looking for pre-retirement advice and you are in your 40s rather than your 50s), talk to us and we'll suggest whether we can still help or not:

Type of client	This could include...
Clients age 50+ that are looking for <b>pre-retirement advice</b>	<ul style="list-style-type: none"><li>• Pension tidy up</li><li>• Growing investments</li><li>• Cashflow planning</li><li>• Retirement guidance</li></ul>
Clients that need <b>advice in retirement</b>	<ul style="list-style-type: none"><li>• Income generation</li><li>• Passing on assets</li><li>• Investment management</li></ul>
Clients that are <b>new to financial advice with large investable cash sums</b>	<ul style="list-style-type: none"><li>• Received inheritance</li><li>• Pension cash</li><li>• Windfalls</li><li>• Business sale</li><li>• Career leap</li><li>• Downsizing</li></ul>
Clients that have <b>complex affairs</b>	<ul style="list-style-type: none"><li>• Multiple goals</li><li>• Large families</li><li>• Tax concerns</li><li>• Divorce</li><li>• Mental incapacity</li></ul>
Clients that want to invest with <b>charitable intent</b>	<ul style="list-style-type: none"><li>• Gifting excess assets</li><li>• Managing charity funds</li><li>• Leaving a charitable legacy</li></ul>

We help UK resident individuals, couples, charities and trust clients.

## Your Ethical Beliefs

Cutting across the financial advice that we give is our dedicated approach to integrating your desire to invest ethically, be it for the benefit of the planet, or for other people, or for both.

Investing ethically requires analysis of your social and environmental concerns as well as your financial needs. Each ethical fund or portfolio that we recommend you invest in has its own ethical investment criteria, so by understanding what issues are of concern to you it helps us make an appropriate match. It also helps us understand whether anything you already have in place is suitable.

## The Sort Of Products We Advise On

We specialise in recommendations involving pensions and investments in the main, ones that can accommodate our desired ethical investments within them, as well as protection products where suitable (life insurance, etc).

We don't advise on mortgages, equity release or general insurance (buildings insurance, etc).

## What You Should Expect If You Sign Up

We offer a tiered service from Levels 1 to 3. When you first talk to us about your goals and circumstances we will advise you on which of the three Levels you are most suited to aspire to.

Advice Level	This involves...
<b>Level 1: Initial Advice</b> Out of this is born your personalised 'Financial Plan'	<ul style="list-style-type: none"><li>• Information Gathering</li><li>• Opinion Gathering</li><li>• Preparing and Presenting Recommendations</li><li>• Making Decisions</li></ul>
<b>Level 2: Implementation</b> This entails putting in place products and services that satisfy the recommendations made in your Financial Plan	<ul style="list-style-type: none"><li>• Product and investment recommendations</li><li>• Help with 'paperwork'</li><li>• Monitoring, managing and progressing the implementation</li><li>• Final checks</li></ul>
<b>Level 3: Ongoing Advice</b> This involves keeping your financial affairs in order	<ul style="list-style-type: none"><li>• Annual Reviews</li><li>• Mid-Term Updates</li><li>• Mid-Term Sounding Board</li></ul>

## More Information

### B Corp

We are a proud 'B Corp. Certified Benefit Corporations, or B Corps for short, are companies verified by B Lab, a non-profit network, to meet high standards of social and environmental performance, transparency and accountability. Find our B Corp Directory entry at: [www.bcorporation.net/en-us/find-a-b-corp/company/good-green-money-ltd/](http://www.bcorporation.net/en-us/find-a-b-corp/company/good-green-money-ltd/)

Certified



### Good Green Foundation CIC

We commit **2% of our annual turnover** to the Good Green Foundation CIC (Community Interest Company), which is on a mission to re-wild pockets of land for the benefit of society and the environment. Learn more at [www.goodgreenfoundation.co.uk](http://www.goodgreenfoundation.co.uk)



### Deafconnect

We work with the deaf charity Deafconnect to employ interpreters during meetings with profoundly deaf clients interested in receiving ethical financial advice.



**Deafconnect**  
Breaking Barriers  
Enabling Equality

### YouTube

We produce regular vlogs on ethical investments and related issues. Sign up via our website [www.goodgreenmoney.co.uk](http://www.goodgreenmoney.co.uk) to keep informed of any new content we add.



## Get In Touch!



Contact us using the details on the front of this brochure or complete the Contact Form on our website. Tell us what you are looking for and we will do our best to help. Via our website you also have the opportunity to sign up to our Newsletter.

**We look forward to hearing from you!**

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Helping people, **helping the planet**, helping you