

Timely financial planning, tailor-made to meet your future needs

OCTAGON CONSULTANCY SERVICES

INVESTMENT ADVICE

- Tax advantageous investment planning
- Trustee investment advice
- On and off shore investment advice
- Portfolio construction, review and management

RETIREMENT PLANNING

- Retirement reviews
- Personal/Stakeholder/Executive pensions
- Self invested (SIPPS) and self administered (SSAS) pension schemes
- Income drawdown and phased retirement
- Annuities
- Pension property purchase

CORPORATE SERVICES

- Tax planning
- Business protection
- Group risk plans
- Employee benefits

PROTECTION PLANNING & GENERAL INSURANCE

- Family protection
- Income protection
- Long term care
- Healthcare/Private medical insurance

TAX PLANNING

- Inheritance tax planning (IHT)
- Income and Capital Gains Tax (CGT) planning
- Trust and Estate planning

MORTGAGE ADVICE

- Purchase
- Remortgage
- Buy to let
- Commercial Financing

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To arrange an appointment
please contact us on
Tel: 0117 9331 661
Fax: 0117 9331 662



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Octagon Consultancy Ltd
2 Hurl Road, Clifton, Bristol BS8 2SY
Tel: 0117 9331 661 Fax: 0117 9331 662
e-mail: info@octagonconsultancy.co.uk

Your home may be repossessed if you do not
keep up repayments on your mortgage.
For advising on mortgages we charge a fee of typically £500.

Octagon Consultancy Ltd
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Jul 2006



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Retirement Planning

Protection Planning and General Insurance

Investment Advice

Corporate Services

Mortgages and Lending

Tax Planning

The Octagon story

Octagon is a firm of professional financial planning consultants based in Clifton, Bristol.

Whether you are looking for personal or business advice your Octagon consultant is able to draw upon the relevant expertise to meet your needs. While each client has a personal point of contact, we review all plans and proposals with other members of Octagon. As a team we already know how much we can benefit from each others' experience. This is why we believe in being 'Structured for Strength'.

Financial planning has become increasingly complex and sophisticated but with the expertise our team can offer, solutions can be found to suit clients' needs in almost every circumstance. We have specialists who keep abreast of changes in legislation and market developments. This means we can provide the highest standards of advice for you and your business in an efficient and concise manner.

We have also formed a number of close links with complimentary organisations, and this enables us to offer a truly rounded, independent financial planning service, linked where necessary to your existing professional advisers.

We are totally independent and able to look at all of the products and services of financial institutions before we pick the right ones for you. We are committed to maintaining the highest standards and offer a comprehensive range of advice for you and your business.



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