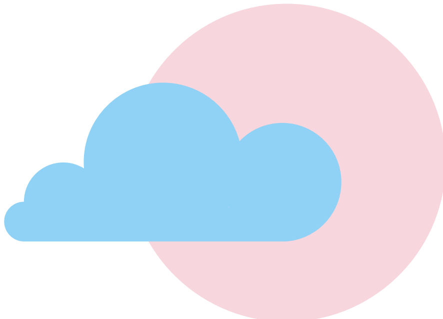
MERCER

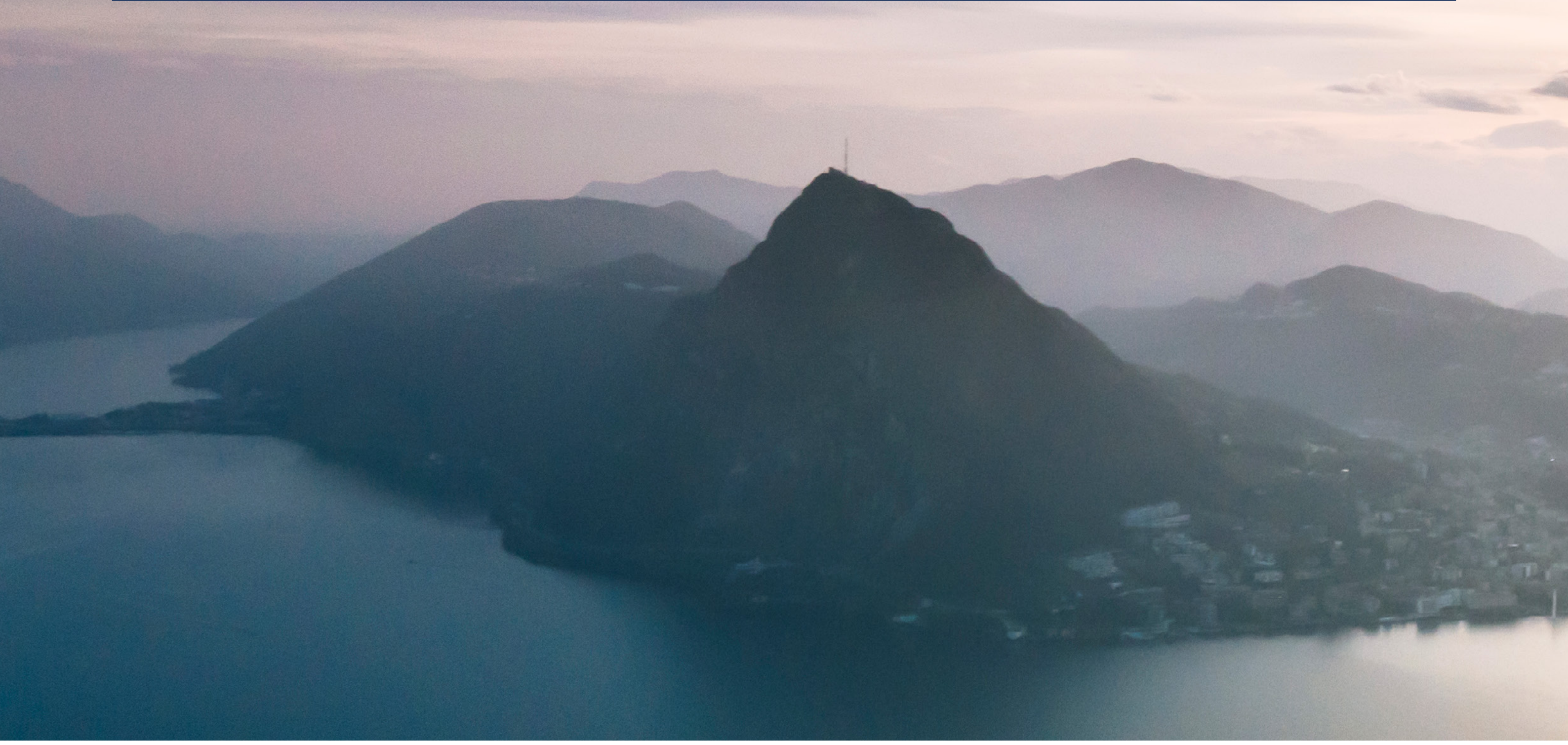
Preparing for the future together

Mercer helps clients to navigate the shifting landscape of private wealth and live happy, secure and prosperous lives.

Mercer Private Wealth



Rarely has the landscape for private wealth been so unpredictable. Taxes and regulations are continually changing, and financial markets are increasingly volatile. Mercer's story explores how we help our clients to plot a course through this challenging environment to create a successful financial future.



1

How is Mercer Private Wealth different?

We're perfectly positioned to enable people to take control of their finances, effectively energising their wealth. This matters when navigating today's economic landscape, which can be exceptionally challenging.

Legislation and taxation are in an almost constant state of flux, and financial markets are moving much faster than ever before. As a result, we all need to take more individual responsibility for our finances, but all too often we are faced with a bewildering amount of choice.

That means there's a need for expert financial advice, twinned with global investment management capabilities. As financial markets become more complex, only world-class investment oversight can provide the best outcomes for private wealth.

But more than this, we care.

2

Building relationships and loyalty

Our priority is to build trusting relationships with clients that will last a lifetime. To us, it's personal.

Clients come to Mercer with specific needs. These might be related to protection, tax, investing, pensions or saving for children's school fees. Typically, our financial planners get to know a client's entire financial circumstances and requirements. We recognise that everybody is different.

We build relationships with our clients over time, from their early years through to retirement, becoming trusted advisers from one generation to the next. It's not just the big decisions that matter, either: we understand that lots of small details are important too. We pride ourselves in supporting our clients to achieve their goals. Our financial planners' expertise and extensive experience allow us to offer a fresh perspective, ensuring that we can design the most appropriate solutions. Testifying to the quality of our service is our clients' loyalty — referrals are a major part of how we've grown our business.

3

A reliable partner in a changing world

As the world of managing private wealth becomes more complicated and challenging, a reliable, trustworthy, expert and well-resourced partner is essential. And that is what we are.

Mercer Private Wealth is part of Mercer, which helps millions of individuals worldwide, and some of the largest institutions, to secure their financial future. Our advice comes from chartered financial planners, the gold standard for financial advice in the UK.

Mercer is part of Marsh & McLennan Companies (MMC). Established in 1871, Marsh & McLennan is one of the world's leading professional services firms in the areas of risk, strategy and people, with 76,000 employees in over 130 countries, and helps individuals and organisations to navigate an increasingly complex and dynamic environment.

In conclusion

Mercer Private Wealth fuses empathy with economics. Our chartered financial planners and investment managers' integrity and expertise, backed up by a global investment team, give clients peace of mind. By helping people make the choices that are best for them in today's challenging financial landscape, we help people to be happy, secure and prosperous.

MERCER

Contact us

Email: privatewealth@mercer.com
Website: www.uk.mercer.com/mercer-private-wealth

Additional support

We are committed to supporting our clients who may be vulnerable, have disabilities or additional / alternative communication requirements. Our teams undergo training on being able to identify certain vulnerabilities, however we would encourage clients who would benefit from additional support, whether that be in respect of taking account of any physical disabilities you may have or the method in which we communicate with you, to contact your financial planner to let us know how we can help.

welcome to brighter

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