WELCOME TO

Lathe&Co

WHERE WE DO THINGS A LITTLE DIFFERENTLY THAN THE REST

You're now using a truly independent, client focused financial adviser from Lathe&Co.

This is a brief guide detailing the ins and outs of how to get the best value from our service.

Meetings

How long?
45 minutes on average, never much longer than an hour. They are specifically designed to be informative and concise.

How many?
Whilst there is no limit, a typical year means seeing us twice. If there is more going on it can increase to four meetings.

Questions

We don't expect our clients to be experts on all things financial planning. **That's why they use us.**

Your adviser will never be surprised by your questions, we've been asked everything you could imagine in the past!

Feedback

"We all need people who give us feedback. That's how we improve."

Bill Gates

You are now a part of our journey, if you'd like to see something from us, let us know and we can make changes.

Engagement

We encourage your engagement to enable us to provide the best service.

Think about what you want from us, and we can work with you to make that happen.

We only ever produce high quality, client specific content. Be sure to keep up to date via our regular newsletters.

Allowing us to advise you fully will give better results: Behavioural coaching estimated to add up to 1.50% per year to overall Alpha.

(Source: Vanguard; Adviser Alpha)

Share our name

Our job is to simplify our client's lives. If you have friends, family or colleagues who haven't had the chance to do this for themselves yet, we are happy to meet them for a chat.

If they do become a Lathe & Co client, you will both be upgraded to our enhanced ongoing service level at no extra cost.