

[Savings & Investments](#)

## Savings & Investments

Explore each stage to see where you are in your retirement journey

---



You are likely to be between 16 and 29 years old and possibly starting your first job after your education. You will be enjoying your financial independence, possibly looking to buy your first vehicle and purchasing a property. At this stage of your career you may get married and start a family.

[Savings & Investments](#)

## Savings & Investments

Explore each stage to see where you are in your retirement journey

---



You are likely to be between 30 and 45 years old and are progressing well in your career. You will be enjoying your financial independence and possibly looking to change your vehicles on a regular basis and upsize your home. You may be looking at exotic holidays and planning for your children's future education.

Savings & Investments

## Savings & Investments

Explore each stage to see where you are in your retirement journey

---



You are likely to be between 46 and 59 years old and established well in your career. Your children are likely to be grown up and independent. You are likely to have a good disposable income and enjoying your lifestyle. You may be looking the best returns for your savings & Investments and may even have had an inheritance.

Savings & Investments

## Savings & Investments

Explore each stage to see where you are in your retirement journey

---



You are likely to be over 60 years old and either exiting or exited your career. You are likely to have capital lump sums available. You are probably looking to downsize your house and may have grandchildren. You may be looking for the best income producing schemes available and looking for ways to protect your capital and leave a legacy.

Savings & Investments

## Early Career

Early Career



### You may need help to think through:

- how to budget effectively
- how much of an emergency fund you will need
- what government schemes are available to help with savings & investments
- tax efficiency
- which mortgage option would best suit you
- which pension saving schemes are best for your situation
- how you can best fund future expenditure, holidays and children's education
- how you can best protect your family and income in the event of death or illness

Say hello

## Early Career - Other information

### Early Career

#### Savings and Investments

Genesis Wealth Creation Ltd are here to help you gain financial independence and secure the lifestyle you deserve through Savings and Investment Planning.

Savings and Investment Planning is for anyone who is looking for financial independence. It isn't about having a vast amount of money available to invest, nor is it about investing in complicated investments.

It is all about understanding your objectives and the timescale in which you want to accomplish them.

Whether you have a cautious or an adventurous attitude, we will use our expertise and experience to provide you with a solution taking into consideration your objectives and your attitude to investment risk, including:

- Analysing your existing investments to establish that they are appropriate given your financial position and investment objectives.
- Explaining the various types of investments available to you.
- Agreeing on the most appropriate, tax efficient way to look after your investments.
- Developing a strategy that meets your objectives and agree a review program to keep it on track.

**Please be aware the value of investments and income from them can fall as well as rise and you may get back less than the original amount invested.**

#### Savings and Investment Planning from Genesis Wealth Creation could involve some of the following:

- Individual Savings Accounts (ISAs) - including transfers
- Help to buy ISA
- Guaranteed Investments
- Investment Bonds
- Unit Trusts
- Open Ended Investment Companies (OEICs)
- National Savings
- Savings for Children
- Planning for School Fees
- Friendly Society Plans
- Ethical Investments
- Investment Trusts
- Offshore Investments
- Venture Capital Trusts (VCTs)
- Enterprise Investment Schemes (EISs)

We will work with you to find out which of these options is the most appropriate for your circumstances, goals and even your personality.

When it comes to savings and investments, everyone has a different idea of what they want and how they'd like to achieve it. We will take the time to understand what you need and put together the strategy that is appropriate for you.

To find out more about expert Savings and Investment planning, **get in touch with Genesis Wealth Creation today.**

**The Financial Conduct Authority does not regulate Deposit Accounts or National Savings.**



Savings & Investments

## Mid Career

---



### You may need help to think through:

- how to budget effectively
- how much of an emergency fund you will need
- what government schemes are available to help with savings & investments
- tax efficiency
- which mortgage option would best suit you
- which pension saving schemes are best for your situation
- how you can best fund future expenditure, holidays and children's education
- how you can best protect your family and income in the event of death or illness

[Say hello](#)

## Mid Career - Other information

### Mid Career

#### Savings and Investments

Genesis Wealth Creation Ltd are here to help you gain financial independence and secure the lifestyle you deserve through Savings and Investment Planning.

Savings and Investment Planning is for anyone who is looking for financial independence. It isn't about having a vast amount of money available to invest, nor is it about investing in complicated investments.

It is all about understanding your objectives and the timescale in which you want to accomplish them.

Whether you have a cautious or an adventurous attitude, we will use our expertise and experience to provide you with a solution taking into consideration your objectives and your attitude to investment risk, including:

- Analysing your existing investments to establish that they are appropriate given your financial position and investment objectives.
- Explaining the various types of investments available to you.
- Agreeing on the most appropriate, tax efficient way to look after your investments.
- Developing a strategy that meets your objectives and agree a review program to keep it on track.

**Please be aware the value of investments and income from them can fall as well as rise and you may get back less than the original amount invested.**

#### Savings and Investment Planning from Genesis Wealth Creation could involve some of the following:

- Individual Savings Accounts (ISAs) - including transfers
- Help to buy ISA
- Guaranteed Investments
- Investment Bonds
- Unit Trusts
- Open Ended Investment Companies (OEICs)
- National Savings
- Savings for Children
- Planning for School Fees
- Friendly Society Plans
- Ethical Investments
- Investment Trusts
- Offshore Investments
- Venture Capital Trusts (VCTs)
- Enterprise Investment Schemes (EISs)

We will work with you to find out which of these options is the most appropriate for your circumstances, goals and even your personality.

When it comes to savings and investments, everyone has a different idea of what they want and how they'd like to achieve it. We will take the time to understand what you need and put together the strategy that is appropriate for you.

To find out more about expert Savings and Investment planning, **get in touch with Genesis Wealth Creation today.**

**The Financial Conduct Authority does not regulate Deposit Accounts or National Savings.**





Savings & Investments

## Late Career

Late Career



### You may need help to think through:

- how to get the best returns from your savings and investments?
- what government schemes are available to help with savings & investments
- tax efficiency
- what trusts are available to help pass on wealth
- which pension saving schemes are best for your situation
- how you can help with funding for your children's home / car purchase

Say hello

## Late Career - Other information

### Late Career

#### Savings and Investments

Genesis Wealth Creation Ltd are here to help you gain financial independence and secure the lifestyle you deserve through Savings and Investment Planning.

Savings and Investment Planning is for anyone who is looking for financial independence. It isn't about having a vast amount of money available to invest, nor is it about investing in complicated investments.

It is all about understanding your objectives and the timescale in which you want to accomplish them.

Whether you have a cautious or an adventurous attitude, we will use our expertise and experience to provide you with a solution taking into consideration your objectives and your attitude to investment risk, including:

- Analysing your existing investments to establish that they are appropriate given your financial position and investment objectives.
- Explaining the various types of investments available to you.
- Agreeing on the most appropriate, tax efficient way to look after your investments.
- Developing a strategy that meets your objectives and agree a review program to keep it on track.

**Please be aware the value of investments and income from them can fall as well as rise and you may get back less than the original amount invested.**

#### Savings and Investment Planning from Genesis Wealth Creation could involve some of the following:

- Individual Savings Accounts (ISAs) - including transfers
- Help to buy ISA
- Guaranteed Investments
- Investment Bonds
- Unit Trusts
- Open Ended Investment Companies (OEICs)
- National Savings
- Savings for Children
- Planning for School Fees
- Friendly Society Plans
- Ethical Investments
- Investment Trusts
- Offshore Investments
- Venture Capital Trusts (VCTs)
- Enterprise Investment Schemes (EISs)

We will work with you to find out which of these options is the most appropriate for your circumstances, goals and even your personality.

When it comes to savings and investments, everyone has a different idea of what they want and how they'd like to achieve it. We will take the time to understand what you need and put together the strategy that is appropriate for you.

To find out more about expert Savings and Investment planning, **get in touch with Genesis Wealth Creation today.**

**The Financial Conduct Authority does not regulate Deposit Accounts or National Savings.**



Savings & Investments

# Retirement Plans

Retirement  
Plans



## You may need help to think through:

- how to get the best income from your savings and investments?
- what government schemes are available to help with your savings & investments
- tax efficiency
- what trusts are available to help protect and to pass on wealth
- which options are best for your pension schemes drawdown
- how you can help with funding for your grandchildren's future
- Planning for any long term care needs

Say hello

## Retirement Plans - Other information

### Retirement Plans

#### Savings and Investments

Genesis Wealth Creation Ltd are here to help you gain financial independence and secure the lifestyle you deserve through Savings and Investment Planning.

Savings and Investment Planning is for anyone who is looking for financial independence. It isn't about having a vast amount of money available to invest, nor is it about investing in complicated investments.

It is all about understanding your objectives and the timescale in which you want to accomplish them.

Whether you have a cautious or an adventurous attitude, we will use our expertise and experience to provide you with a solution taking into consideration your objectives and your attitude to investment risk, including:

- Analysing your existing investments to establish that they are appropriate given your financial position and investment objectives.
- Explaining the various types of investments available to you.
- Agreeing on the most appropriate, tax efficient way to look after your investments.
- Developing a strategy that meets your objectives and agree a review program to keep it on track.

**Please be aware the value of investments and income from them can fall as well as rise and you may get back less than the original amount invested.**

#### Savings and Investment Planning from Genesis Wealth Creation could involve some of the following:

- Individual Savings Accounts (ISAs) - including transfers
- Help to buy ISA
- Guaranteed Investments
- Investment Bonds
- Unit Trusts
- Open Ended Investment Companies (OEICs)
- National Savings
- Savings for Children
- Planning for School Fees
- Friendly Society Plans
- Ethical Investments
- Investment Trusts
- Offshore Investments
- Venture Capital Trusts (VCTs)
- Enterprise Investment Schemes (EISs)

We will work with you to find out which of these options is the most appropriate for your circumstances, goals and even your personality.

When it comes to savings and investments, everyone has a different idea of what they want and how they'd like to achieve it. We will take the time to understand what you need and put together the strategy that is appropriate for you.

To find out more about expert Savings and Investment planning, **get in touch with Genesis Wealth Creation today.**

**The Financial Conduct Authority does not regulate Deposit Accounts or National Savings.**

