



MARTIN BARRY

---

WEALTH MANAGEMENT &  
ESTATE PLANNING



MARTIN BARRY J.P. CERT PFS

PARTNERS IN MANAGING AND PROTECTING YOUR WEALTH

# WELCOME

---

**T**hroughout my career I have been providing wealth management and estate planning solutions to both individual and corporate clients through some of the largest financial institutions in the UK.

Over the years, I have found that while my clients have similar concerns, they all require individual solutions to meet their personal objectives.

The best way I can provide the perfect solutions is to build a professional and trusted relationship with every client, that enables me to tailor my advice to suit your personal circumstances.

This means I am able to offer my clients a complete financial planning service, ensuring their wealth continues to grow whilst minimising tax liabilities and protecting themselves, their families and their businesses.

I work in partnership with carefully selected companies who reflect the same ethos as myself, these include the most respected solicitors, accountants and financial advisers. I would welcome the opportunity to help you as I have helped so many others over the years.



**Martin Barry**

# THE IMPORTANCE OF A PROFESSIONAL WILL

---

The absence of a Will can cause problems, heartbreak, financial hardship and unnecessary expense for your family at the worst possible time. With our help and for a small investment of time and money you can write exactly what you want in your will, protecting your loved ones whilst enjoying peace of mind.

For someone who dies without having written a Will (Intestate) the government has a standard Will, which almost certainly will contradict what their true wishes would have been.

## Some things to remember

- **To avoid dying intestate (without a Will) and allowing your possessions to be distributed accordingly to the law of intestatesy.**
- **In your Will you can appoint a Guardian of your choice to look after your children if you die before they reach the age of 18.**
- **Administering an estate with a grant of probate, where there is a Will is far quicker and cheaper than without. Why give banks and Solicitors money that may be needed by your loved ones?**
- **It is commonly believed that husbands and wives are automatically entitled to inherit everything from each other. This is not the case.**
- **If you are not married, then your partner will not inherit your estate, at least not without a long and expensive legal battle.**
- **Increased property values may make your estate liable to Inheritance Tax. These can be minimised or even eliminated by a carefully written Will.**
- **You may want to prevent certain members of your family from benefiting from your estate - this can only be done by writing a Will.**
- **You may want to leave something to friends, colleagues or charities - this can only be specified in your Will.**



*“Martin Barry has always gone out of his way to help and support me and my interests. He has given sound advice and guided me, putting my interests first.”*

**Mr Johnson, Staffordshire**

## THE SERVICE WE OFFER

---

**M**artin Barry has a range of competitively priced products and services. By using a combination of these services we will ensure that your assets are protected.

Our services include; long term care, bloodline planning, inheritance tax planning, business asset protection, tax mitigation strategies, professional trustees, Wills, full probate service, deed of variation, conveyancing, power of attorney (LPA), living Wills / advanced directives and parental responsibility.

Martin Barry can help you deal with the loss of a loved one, which can be very difficult and a stressful time. But even at this stage - it is not too late to plan. Our qualified probate team offer more than just help dealing with obtaining the grant of probate: We can offer independent advice on the Will itself and can ensure that the assets

being passed through the Will to the beneficiaries are protected from care costs, further inheritance tax, divorce, creditors and bankruptcy. A friendly and sympathetic team member of Martin Barry Wealth Management and Estate Planning will meet you initially free of charge in the comfort of your own home, and give you professional advice with a competitive fixed fee.

Martin Barry also offers business estate planning strategies which are tailor made to suit you and your business, offering protection if anything were to happen to you or your business partner. The use of business trusts will ensure that your business assets pass directly to your beneficiaries without impacting on their estates and later giving these same assets protection from any potential threats from care costs, further inheritance tax, divorce, creditors or bankruptcy.



*“Although that I have not known Martin for very long, I feel that I can trust him. He has helped me through a very difficult time and has explained about investments in a language that I could understand.”*

**Mrs Taylor, Worcestershire**

## A TAILORED APPROACH

---

**M**artin Barry works in partnership with Countrywide Legal Services, who specialise in asset protection.

Our Warwickshire based team of qualified, friendly advisers can arrange a visit in the comfort of your own home to assess your current situation, answer questions and provide peace of mind for the future.

Martin Barry has chosen to work in partnership with Countrywide Legal Services as they hold the interests of their clients as the priority and provide sound practical advice based on the clients' individual

circumstances. Advisers are all qualified to provide assistance in the specialised area of estate planning whilst Directors and Principles of Countrywide Legal Services are fully qualified and members of the society of trust and estate practitioners (S.T.E.P).

So even if you have made a Will, is it up-to-date and relevant, does it say exactly what you want it to say, does it protect your home from care costs and does it minimise your liability to inheritance tax? To ensure your Will delivers exactly what you require from it, contact us today.



*“Martin is trustworthy and honest and nothing is too much trouble for him. I would not hesitate in recommending him to anyone. I think of him as not only a financial adviser but also as a friend.”*

**Mr Skidmore, Herefordshire**

# YOUR QUESTIONS ANSWERED

---

With over 15 years experience in estate planning and Will writing, you can rely on Martin Barry Wealth Management to provide a comprehensive,

professional service. You will of course have questions and can trust us to give you sound advice.

## Typical Questions

1. How do I protect my home and assets from care costs?
2. What if I am unable to manage my affairs?
3. How can I preserve my business assets for my family?
4. How can I protect my children's inheritance?
5. But won't everything go to my husband/wife/civil partner/parents children etc automatically?

We would be more than happy to answer any questions you may have, please call us on 01527 852 897

search for game 6 (also tr) are  
from L quaesita sought, from a  
> 'questing adj > 'questingly  
**question** ('kwɛstʃən) n 1 a for  
person in order to elicit infor  
response; interrogative sente  
only a question of time until she die

*“I was most pleased with the advice and help given during the meetings I had with Mr Barry, he has been very supportive.”*

**Mrs Beaman, Warwickshire**



**MARTIN BARRY**

---

WEALTH MANAGEMENT &  
ESTATE PLANNING

**MARTIN BARRY** J.P. CERT PFS

---

11A STATION ROAD | STUDLEY  
WARWICKSHIRE | B80 7HR

T: 01527 852 897

M: 07788 583 980

W: [www.sjpp.co.uk/martinbarry](http://www.sjpp.co.uk/martinbarry)

E-MAIL: [martin.barry@sjpp.co.uk](mailto:martin.barry@sjpp.co.uk)