Glover
Wealth
Advisory

Glover Wealth Advisory

Expert Wealth Management Services Wherever You Are in the World

INDEPENDENT · DIGITAL · MODERN · REGULATED

Why Choose Glover Wealth Advisory?

Your individual needs are unique. They deserve unique solutions.

Transparency and Patience

My clients deserve complete transparency from me, so my job is to listen patiently, take the time to understand the complexities of their situation, then provide them with a full and honest assessment, enabling them to make the best informed decision they can.

Personalisation

Your individual needs are unique, so the financial advice and wealth management you receive should be too. You won't just receive the same old off-the-shelf solutions from me.

Experience

I have over 10 years' experience in wealth management and financial advice. In addition, I have over 1,000 hours of FINMA- and FCA-approved study time across 10 different qualifications. These are all MiFID II compliant and are UK RQF Level 3 & 4, or EU (and Switzerland) RQF Level 4 & 5.

Modern and Considered Advice

Considered advice delivered calmly and clearly via vibrant and digitalised solutions. No need for time-consuming paperwork and hassle. Interactive PDFs, digital signatures and up to date technology.

Breadth of Solutions

A vast range of domestic and international solutions available to match the needs of transient expats, with some of the world's best platforms, pensions and trustees, private banking, private markets, investment funds, discretionary fund managers, structured investments, alternative investments, property, insurance and life assurance.

Global Access

I can offer investment and pension advice and wealth management services across Switzerland, the EU, United Kingdom, USA, the Middle East, South Africa and Mauritius.

Interactive Wealth Centre

All of your documents in one secure place, with simple onboarding and profile set up, for sharing key details quickly. Upload, view and access reports whenever you need them. Advanced data security for safety and confidentiality. Digital approvals: review and sign documents online with full transparency. Instantly see your assets, liabilities, and overall net worth. Accessible anywhere and on any device, whenever it suits you.

Regulation and Compliance

I am both FINMA- and FIDLEG-regulated. In addition, my qualifications are FCA-approved and MiFID II/ESMA-compliant. Beyond this, there is compliance and outstanding administrative support across numerous jurisdictions.

One Adviser, One Point of Contact

Above all, working with me means having a single wealth management point of contact and never being passed from adviser to adviser. We build a connection and an understanding and that remains unchanged.

The Glover Wealth Advisory Approach

It's a three-pronged strategy, formulated with your needs in mind and designed to be adaptive, reflective and engaging:

Why, What, How.

The Why (Purpose)

We start by uncovering your "Why."

What are the life goals, family legacies, or personal freedoms driving your financial needs today and why are these important to you?

The What (Strategy)

Once we have defined the purpose, we identify the "What."

What specific structures, investments, or protections are required to bridge the gap between where you are and where you want to be?

The How (Execution)

We move to the "How."

How do we implement these changes seamlessly across borders using the Glover Wealth Advisory digital-first, independent platform?

The Glover Wealth Advisory Philosophy

Here to Guide, Not Dictate

Think of GWA as a conduit, not a gatekeeper. My job isn't to tell you what to do with your money in a way that serves a bottom line. Instead, I'm here to open doors to the right solutions for your needs and objectives. GWA lays out the options, simplifies the jargon and ensures you're fully informed, so you're always the one in the driver's seat.

Built for the Long Haul

I don't measure success in quarterly returns; I measure it in years. I want to share in your successes and life events by building connections that are meant to endure for years and years, rooted in a personal, human touch that you won't find in a giant corporate office.

Real Conversations, Real Clarity

Finance is famous for being over-complicated, but I believe in keeping it simple. I will always endeavour to strip away the noise so you can see your path clearly. No hidden agendas, no 'expert' ego, just an honest relationship built on helping you find the best way forward.

Three Commitments

1. The Anti-Jargon Promise

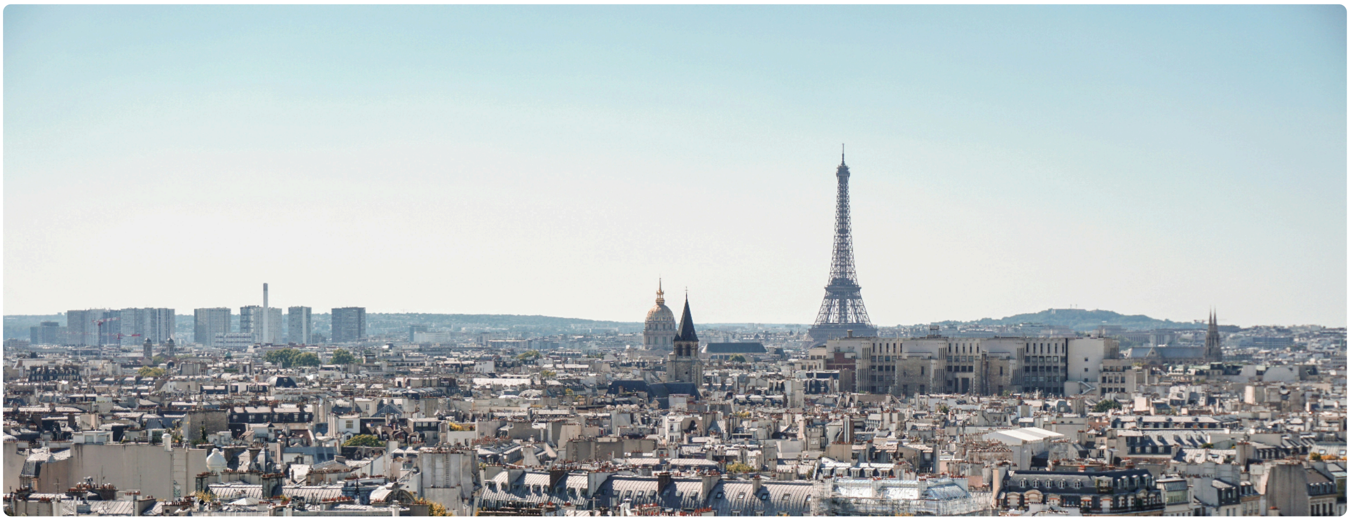
If I can't explain a strategy in plain English, we don't do it. My goal is for you to leave every meeting feeling more knowledgeable and better informed, not more confused.

2. Unbiased Advice via Broad Solutions

Because GWA is an independent firm, it doesn't answer to a corporate HQ or a board of directors. It answers to you and isn't restricted to a small 'approved list' of house-brand products or pushed to meet sales quotas that line a company's pockets. GWA simplifies the massive world of personal finance into a clear set of choices, showing you the pros and cons of each. GWA provides the map and the options; you stay in the driver's seat.

3. The Roadmap

- **Step 1: The Informal Chat.** No numbers, just getting to know your story and what you're looking for.
- **Step 2: The Deep Dive.** We look at the options and simplify the route forward.
- **Step 3: The Roadmap.** You choose the path; GWA provides the vehicle.
- **Step 4: Ongoing Support.** Quarterly reviews to ensure you remain informed and updated.



Wealth Management Services

Financial Planning

Don't know where to begin? Let's assess what you need and when, so we can put a plan in place for your future.

Investment Advice

Tailored investment advice and cashflow calculations, with quarterly updates and market commentary.

Savings Plans

Assess a variety of savings plans, in different currencies, suitable for internationally mobile investors.

Pensions & Retirement

Retirement and lifestyle planning calculations and state, private and employer pension drawdown advice.

Fund Management

Expert discretionary or advisory fund management and portfolio services from a variety of global options.

Children's Education Funding

Detailed analysis for parents of the full costs of children's education around the world.

UK Pension Transfers

Assess your options and receive personalised advice, investment guidance and drawdown strategies.

Mortgage Affordability

Find out what you can afford to buy and when, with full analysis of associated costs.

Relocation Advice

Full checklist and guidance for internationally mobile professionals considering relocation.

The Swiss Pillar 3a

Assessment of the pros and cons, including a full comparison of solutions and the alternatives.

Estate Planning

Create structures and plans for managing, protecting and distributing your assets.

Cost of Care Planning

Plan for future costs of medical care when you need it most, wherever you are in the world.

Request Personalised Wealth Management Today

Independent, modern, digital, regulated wealth management wherever you are in the world.

Book a consultation →

Glover Wealth Advisory

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