

Matrix Capital

Financial Planning

“we are planning to be with them in the long-term”

The Situation

In March 2014, we were awarded the contract with National Savings and Investments (NS&I) to provide advice to the £1 million Premium Bond jackpot winners should they decide they want it. This winner and his wife, now clients of our practice, did decide they might benefit from meeting with us...

The winner, who understandably wishes to remain anonymous, had recently retired and his wife was working full-time. When the door knocked and the news was delivered by Agent Million, the reaction was as you would expect - shock and disbelief.

Pleased with NS&I's offer of support by way of a confidential, no obligation meeting with a financial planner, the winners decided to take it up. "Winning such an amount is life-changing and we wanted to avail ourselves of some sound advice. NS&I had been rigorous in their vetting of Matrix Capital, so we naturally thought that we were in a safe pair of hands."

The Problem

As well as a dilemma of deciding who to tell, the winners were also aware of the value of financial planning under such circumstances. "We knew that without sound financial planning our win would do very little for us. We wanted it to work for us."

How the Matrix Capital Limited team helped

"We were both impressed with the initial meeting and the fact that we were never placed under any pressure to engage with them. We were given choices and we had plenty of time to discuss these without any time constraints.

Matrix Capital took their time to take care of our needs and to fully understand our current financial situation. They clearly defined their stepped approach, and made sure we fully understood our commitment.

Working with Matrix Capital has enabled us to take a fairly relaxed attitude toward our future. Whilst the markets can fluctuate we know that there is a team behind us that can react to the changes in our investment and if we have serious concerns the team are only a phone call away.

Obtaining professional advice for us was the right move and has enabled us to sleep well at night knowing that our money is being invested according to our needs.

Winning the jackpot has helped us to both realise our goal of finishing work long before our target date."

What the client said about Matrix Capital Limited

"When we have had any questions, Robin and his team have always responded quickly. Their approachability is second to none and any issues we have had have been explained in plain English and nothing seems to be too much trouble for them.

This dimension is probably due to their size, which I think offers a more personal touch when dealing with clients. They have made what to some might seem a daunting process relatively easy to follow in a clear and friendly manner.

I would say that professional financial planning is a must, a good professional team like Matrix Capital offer a no nonsense approach to risk based investments, backed by a good sense of customer service and focus."



Matrix Capital Limited
Chartered Financial Planners