



Price Ferguson Wealth Management

Independent financial advice for every life stage



Welcome

A Welcome from our **Chairman**

When I founded Price Ferguson in 1997, my focus was to create a Wealth Management company that had the people of Guildford firmly at heart. I wanted to help people as best I could with the complexities of investing money, managing pensions and a whole range of financial planning and family needs. That commitment remains at the heart of everything we do today. We take the time to understand what matters most to you, creating clear, personalised financial plans that support you through every stage of life. By building long-term partnerships, we help you move forward with confidence, whatever the future brings.

I invite you to explore this brochure and discover how our approach can help secure your financial future. I look forward to welcoming you and working together for many years to come.

Michael Price | Chairman



Michael Price

A Welcome from our **Managing Director**

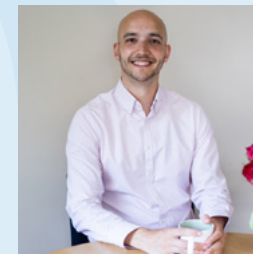
The most important thing to us is delivering the best outcomes for our clients, while building and maintaining long-term, trusted relationships.

Looking after your financial affairs is an important responsibility, so we aim to provide a consistently high level of service to everyone, with clear communication and complete transparency in everything we do.

Our whole team work together to provide ongoing support while staying ahead of changing environments, so we're available whenever you need us.

This brochure outlines how we work and what you can expect from us. We look forward to working with you and supporting you over the years ahead.

Greg Tichbon | Managing Director



Greg Tichbon

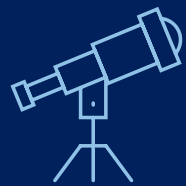
Our History

1. 2. 3. 4.



Serving Surrey for almost 30 years

Price Ferguson was founded in 1997 by our current Chairman, Michael Price. We opened our first office in Guildford, establishing firm roots in the local community. Since those early days, we have steadily grown our business, with a clear focus on serving the people of Surrey.



Vision for Transparent Advice

From day one, our vision has remained the same. We provide fully transparent, independent financial advice in a highly personal way. We offer our clients absolute peace of mind and lifetime support at every financial milestone. We know that true wealth management is a lifelong partnership built on trust and clarity.



Growth Across the County

As our reputation grew, so did our footprint. We expanded our reach across Surrey by opening additional offices in Farnham, Esher, and the Surrey Hills. This steady growth enables us to be closer to our clients and to deliver the accessible, tailored service they deserve.



Value of the Human Touch

We use modern technology to enhance our advisory process, ensuring efficiency and accuracy. However, we firmly believe there is no substitute for human, face-to-face advice. When discussing your financial future, a personal connection is vital. At Price Ferguson, we remain committed to providing the dedicated, one-to-one guidance our clients expect, which has defined our history from the very beginning.

What we do

Why choose Price Ferguson? **We offer independent financial advice tailored to every stage of life.** Finding the right financial adviser involves more than just managing money; it's about building a trusted team to support you through your most significant life decisions. Since 1997, we have delivered unbiased wealth management to individuals, families, and business owners across Surrey and the South East.

We focus on delivering tailored strategies that give you complete confidence in your financial future. We focus on you in everything we do. Our dedication to personalised independent financial planning is based on these four key principles.





How we help clients

At Price Ferguson, we believe that effective financial planning goes far beyond simply looking at figures on a page. We take a highly personalised approach, dedicating time to understanding your life, values, and long-term goals. Instead of just analysing your balance sheet, we consider your entire story. As we are entirely independent, our advice remains unbiased and always prioritises your best interests. **We offer integrated, holistic support that connects every aspect of your finances and evolves with you at every stage of life.**



Plan for the future

Take control of your long-term goals with clear, simple financial planning. Whether you're aiming to invest for growth, build wealth for future generations, or prepare for the retirement you've always dreamed of, we are here to support you. We collaborate closely with you to develop a robust financial plan that works now and that we can revise as your life naturally changes over time.



Guard what is important

You need to understand that the people and things you care about most stay protected. Including life cover and income protection, we create personalised protection strategies tailored to your specific needs. By implementing the right safeguards, we help you feel much more secure today and fully prepared for whatever tomorrow might bring.



Live well later in life

As you get older, making informed decisions about your lifestyle, care, and finances becomes increasingly important. We offer expert support with retirement planning, equity release advice, and guidance for later life. Our main aim is to ensure you retain both your comfort and independence, allowing you to enjoy your later years exactly as you desire.



Navigate change

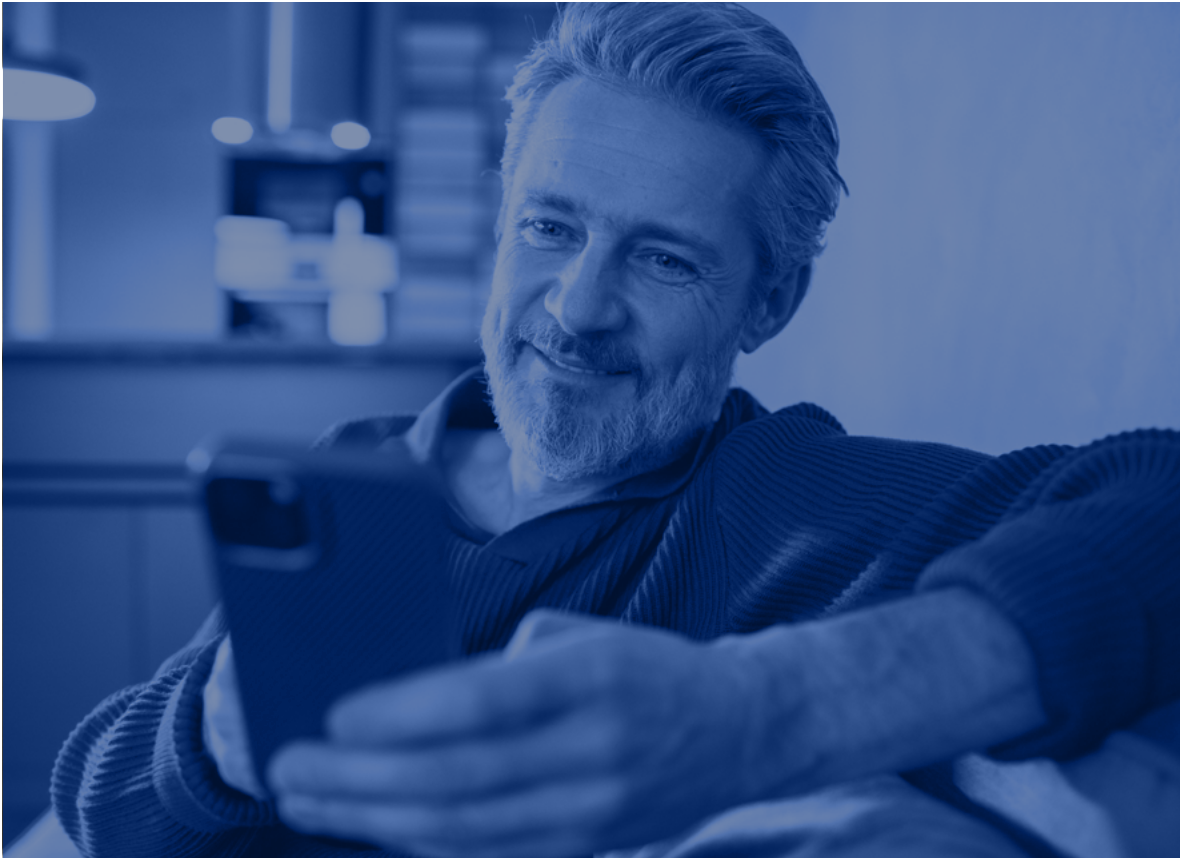
Life seldom follows exactly to plan. When you encounter unexpected changes, whether you're dealing with a divorce, a business succession, or major family transitions, we are here to support you. We provide calm reassurance and clear, practical advice to help you make confident decisions during uncertain times.



Your lifelong financial partner

By bringing all these elements together, we create a clear path forward. We are not just a financial advice firm; we are your long-term partners. We stay with you for the long run, ensuring your financial plan always reflects the life you want to live.

Managing & Growing Wealth



A Strategic Approach to Your Financial Future

At Price Ferguson, we understand that managing your wealth requires more than financial acumen; it requires a deep understanding of your personal ambitions. True financial stability is built on careful planning, foresight, and a disciplined approach to preserving and growing your capital.

Protecting and Multiplying Your Assets

Growing wealth is a dynamic process that requires navigating complex markets while managing risk. We focus on building diversified portfolios tailored to your risk tolerance and timeline. By balancing robust protection strategies with targeted growth opportunities, we ensure your assets work tirelessly for you. Our proactive management enables us to anticipate market shifts, safeguard your wealth against volatility, and capitalise on emerging trends.

Partnering for Long-Term Success

Your legacy deserves expert stewardship. Whether you are planning for retirement, transferring wealth to the next generation, or optimising your current portfolio, our dedicated team provides the clarity you need. We believe that a transparent, collaborative relationship is key to enduring financial health.



Retirement Planning

Securing Your Financial Future

Retirement is not simply an end date; it marks the start of a rewarding new chapter. At Price Ferguson, we believe a fulfilling retirement requires careful, proactive planning. Our approach ensures your wealth works as hard as you do, giving you the freedom to enjoy your later years with complete peace of mind.

Building a Resilient Strategy

A successful retirement plan adapts to your changing life. We look closely at your current assets, future aspirations, and comfortable risk levels. By understanding your unique position, we build a tailored roadmap designed to protect and grow your wealth. This means you can face economic shifts with confidence, knowing your financial foundation remains strong.

Navigating Complex Decisions

Pensions, investments, and tax regulations can feel overwhelming. Our wealth managers simplify this complexity. We provide clear, objective advice to help you maximise your allowances and optimise your portfolio. Whether you are transitioning out of work or planning how to pass on your legacy, we guide you through every critical financial decision. Price Ferguson stands by your side, regularly reviewing your strategy to ensure it stays aligned with your evolving goals.

Inheritance Tax Planning



Protecting Your Wealth for the Next Generation

Passing on your hard-earned wealth should be a source of pride, not a financial burden for your loved ones. Inheritance Tax (IHT) can significantly reduce your estate's value, but with careful foresight, you can mitigate its impact. At Price Ferguson, we believe that early, structured planning is the cornerstone of effective wealth preservation.

Strategic Wealth Preservation

Navigating the complexities of IHT requires a nuanced approach. Our dedicated team examines your unique financial landscape to identify opportunities to improve tax efficiency. From utilising annual exemptions and establishing trusts to exploring charitable giving and lifetime transfers, we ensure your assets are structured to maximise the inheritance your family receives.

Securing Your Family's Future

Legislation is constantly evolving, making it essential to review your estate planning strategy regularly. We provide proactive, tailored advice to help you adapt to these changes seamlessly. By partnering with Price Ferguson, you gain peace of mind, knowing your legacy is protected and your loved ones are financially secure. Let us help you craft a comprehensive plan that reflects your wishes and safeguards your family's future.

Complete Client Care



Price Ferguson works closely with a trusted network of solicitors and accountants to provide clients with a more comprehensive, joined-up service. By bringing key professional advisers together, **we help ensure that financial decisions are practical, well-informed and aligned with wider legal and tax considerations.** This coordinated approach reduces gaps, avoids mixed messages and gives clients greater clarity.

Financial planning is often most effective when every aspect of a client's affairs is considered together. That is why Price Ferguson collaborates with other specialists to develop coherent strategies covering wealth management, tax planning, estate matters and long-term goals. This may include planning for Trusts, Wills and Lasting Powers of Attorney as part of a client's wider financial and family arrangements.

With each adviser contributing their expertise, clients benefit from a smoother process and advice that reflects the bigger picture. Whether planning for retirement, managing wealth or preparing for the future, our focus remains on clear communication and shared understanding. The result is a seamless service that supports better decisions and helps clients and their families move forward with confidence.

Client Testimonials



David P

Greg and the team at Price Ferguson have been fantastic at helping us manage our finances. The advice has been excellent and they are always happy to go the extra mile. They explained the investment options well and went through all the associated risks. I would highly recommend using Price Ferguson.



Trevor S

We have used Price Ferguson over the last four years, Greg our advisor over this time has been invaluable. Having taken early retirement he made the process from Employment to pension very straightforward. I have no reservations in recommending Price Ferguson to look after all of your finances.



Joe A

Ben has been excellent in explaining my pension options and process. He conveyed the information in a way that I can understand, but also provided greater level of detail when I required. What has impressed me is that at no point did I feel at all pressured to take on paid services and made it clear what those costs would be should I decide to move forward. The different levels of service also allows me tailor my costs.

I can highly recommend Ben and the team at Price Ferguson for their professional and measured approach!



Geraldine N

Fantastic pension and investment advice from Greg. Thank you for your endless patience, reassurance and clear explanations.



Neil T

I can't recommend Price Ferguson highly enough, their self styled approach of 'clear and personal' financial advice is quite the understatement. They are a company who have integrity at the heart of their business and delivery.



Philip J

Total confidence and trust when discussing our investment options. We have been clients for many years and have always been happy with the help and advice we have received.

Prefer to meet remotely?

We're happy to work around your needs. Whether by phone, video, or in person, we'll tailor the experience to suit you.



Office Locations

Head Office

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