



Due Diligence Report for Professional Connections



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About NorthStar Wealth Management

At NorthStar, we bring a fresh perspective and innovative approach to wealth management. Our team of chartered financial planners combine their expertise with the latest technology to provide the highest quality independent financial planning and advice. We help our clients take control of their money, grow their wealth, protect their lifestyle and plan for a more certain future.

Established in 2016, NorthStar is a new breed of financial planning company. A modern, dynamic firm built upon core values of integrity, professionalism, transparency, and innovation. Proud to be completely independent and wholly impartial, we are driven to provide the highest levels of service to our clients.

At NorthStar, we believe that everyone should be empowered to make the best financial decisions possible and use their money to live the life they truly want. We are proud to be at the forefront of the technological drive that is transforming the way wealth management services are provided, helping reconnect people with their finances. This revolution will allow people to make better financial decisions by providing the tools and financial advice they require in a genuinely accessible way.

Our mission is to deliver unrivalled financial planning and wealth management services that make a tangible improvement to the lives of our clients. We achieve this by harnessing the latest technology to help our clients understand and optimise their financial position and make the best financial decisions possible. We empower our clients to reconnect with their finances so that they can truly live they life want.

At NorthStar, we understand that money is but a means to an end. We know that ultimately, our job is to help our clients identify, achieve and maintain their desired lifestyle and safeguard their financial future.

“We set out to develop a business that helped our clients live the life they truly want, to help them understand their financial situation, develop long-term financial goals and empower them to make the very best financial decisions.”

James Thompson & Derek Pegg | NorthStar Founders

Working with Professional Partners

At NorthStar, we work with a number of professional partners to help deliver additional specialist services to our clients. We are keen to work with companies that have a commitment to providing exceptional levels of service and have a reputation for high quality work in their specialist fields.

Equally, if you are an accountant, recruitment specialist, estate agent, solicitor, insurance specialist or other professional firm, we can help you to provide the best possible service to any of your clients who need high quality financial planning or wealth management advice.

As well as the various statutory and self-regulatory provisions that require professionals to refer their clients to qualified, independent experts for investment advice, we know that you, like us, may have another, stronger driver: the desire to make sure that your relationship with your clients delivers the best outcome for them.

As a firm of highly qualified Chartered Financial Planners you can be confident that NorthStar have the same commitment to client care, ethics and excellence that you do. We want to keep advising any clients that you refer to us for decades to come – and they will only stay with us if they are delighted with the service we provide. Furthermore, because our service is based on gaining a comprehensive ongoing understanding of the client's circumstances and financial affairs, we will almost invariably need to refer them back to you for further work both in the long and short-term.

Accountants

We understand that many business people see their accountant as their most trusted advisers when it comes to money matters. However, when they require help that involves specific financial products or the management of their investments, accountants are in most cases bound by regulation to refer clients to a qualified independent financial planner. Your business also benefits from making such referrals, as we do what we are best at while you are able to concentrate on the areas where you can add the greatest value for your clients.

Our advice to your clients will involve a thorough appraisal of their financial affairs. In many cases this will highlight areas where you may be able to carry out further work for them. We work with clients who are looking for high quality accountancy services including:

- Statutory accounts
- Management accounts
- Bookkeeping
- Payroll
- VAT advice
- Self assessment
- Cash flow management

Estate Agents

Many estate agents are looking to partner with reliable, knowledgeable financial advisers who are experts in sourcing mortgages for their clients. At NorthStar, we provide fully independent mortgage advice and can recommend any product from the whole of the market. We are also able to advise on related protection products such as life insurance, critical illness cover and mortgage payment protection insurance.

We know that it is important for clients to have a smooth, stress free mortgage application, so we help with the entire mortgage process, ensuring it runs swiftly and successfully. We also provide an ongoing duty of care to all clients to ensure their mortgage and other financial products remain suitable over the longer term.

Recruitment Specialists

We find that there are certain life events that act as a catalyst for people to seek independent financial advice; these being marriage, the birth of a child, divorce, retirement, house purchases and a change of employment situation. When people change jobs, this can often be a great time to seek professional independent financial advice. A new role can often mean a change of income and may also mean a change to pension entitlement, life insurance provision and the need to re-assess household finances in aggregate.

Typically, many people who start a new role will be keen to have a review of their current pension situation, life insurance, income protection, an investment review and often a full financial plan. It is important when changing jobs for people to feel financially secure and know that their finances are in good shape.

At NorthStar, we can help ease the transition into a new job with a full financial review or with expert input on specific areas of need. We work with a number of people moving to both employed positions and those working as contractors to ensure their finances are sound and they have a long-term plan in place.

We work closely with recruitment specialists, helping ensure clients can make the transition to their role as smoothly as possible without any financial worries.

Solicitors

We can help solicitors fulfil their regulatory and professional duty of care to clients by providing specialist, independent financial and investment advice of the highest quality. We have extensive experience working with legal professionals in a range of disciplines, including family (financial planning surrounding divorce, implementing pension sharing orders etc), private client and wills and trusts.

Our work with your clients will, in many cases, result in or uncover further legal work that can be done. We work with clients who are looking for high quality legal services including:

- Trusts
- Trustee support
- Company legal support
- Wills
- Succession planning
- Commercial property purchase
- Conveyancing

Insurance Specialists

We understand that insurance specialists are experts at what they do. Understanding the protection requirements of individuals and businesses requires key skills as well as a sound understanding of client requirements and the options available to them.

There may be times when clients require additional financial help in conjunction with their insurance needs. This may include help with their pensions, investments or broader financial planning, for example.

At NorthStar, we work with insurance specialists to provide complementary services, ensuring the financial affairs of our mutual clients are in the best possible shape both now and in the future.

We understand that many people seek insurance when their life circumstances change – whether getting married, buying a house, having a child or other major life events. These are also the times in life when a Chartered Financial Planner can be of the most benefit, helping clients take stock of their financial position and a putting effective financial plan in place.

Why Refer Clients to NorthStar?

We believe that both you and your clients can benefit when you refer your clients to NorthStar. The key benefits:

1. **Provide your clients with a truly holistic financial service.** By creating a joined-up approach, our mutual clients can receive a truly holistic approach to their finances.
2. **Give your clients access to specialist advice.** We provide high quality, specialist investment, protection, pension, mortgage and financial planning advice to your clients.
3. **Ensure your client's personal financial affairs are efficiently managed.** With our help, our mutual clients will be in a far stronger personal financial position and more likely to remain a long-term client of your company.
5. **Uncover additional work for you.** In the course of our work, we may uncover additional work for you to do. This may include things like valuations, legal work, additional business services and property purchases for example.
6. **Receive referrals from our clients back to you.** Where we think a client of ours could benefit from your services, we will refer them to you.
7. **Provide a truly 'joined-up approach' to the client.** By working in partnership with us, you can ensure your clients get the best level of service. We can provide joint meetings, collaborative projects and clear communication to clients.
8. **Protect your business.** By working with a trusted financial planning partner like us, you can ensure your clients are not referred to another professional firm by an alternative financial planning company.
9. **Enhance your client relationships.** By referring your clients to a trusted financial planning firm, you will gain additional trust and goodwill from your clients.

Our Commitment to Our Professional Partners

When we decide to work alongside a professional partner, we don't do so lightly. Just like working with our clients, we view all our professional partnerships as long-term commitments. We believe that only by developing a strong ongoing relationship, can we provide the very best services to our mutual clients. Our key commitments to our professional partners:

1. **Build long-term relationships.** We are committed to building strong, long-term relationships with all our professional partners. We expect to meet regularly to discuss ideas, industry developments, new ways of working and specific client issues.
2. **Good communication.** We will keep all our professional partners up-to-date with key issues affecting financial planning that may be relevant to our mutual clients. Where a mutual client requires a service you provide, we will flag this with them and inform you to ensure you never miss a business opportunity.
3. **No duplication of services.** We will seek to fully understand the range of services you provide to ensure we never offer anything to your clients which you are happy to provide them.
4. **Referring clients to you.** Where a client of ours requires services which you provide, we will refer them to you. We see our relationship with our professional partners as a two-way street.
5. **Working in partnership.** We will always work in partnership with you to the ultimate benefit of our mutual clients. We believe the sum of your and our work is greater than the constituent parts alone by providing a joined-up approach.
6. **The client comes first.** We always put the client at the centre of everything we do and expect our professional partners to do the same. By forging a close working relationship, we ensure our mutual clients benefit by getting the best possible service.

Services Provided by NorthStar

We have developed a broad range of services that help our clients achieve their financial goals and enjoy a better future. We know that everyone is different and that every client has different needs – so we built a unique service proposition.

NorthStar clients only pay for what they need and only get the services that really benefit them. We're not interested in trying to 'sell' our clients everything we do – we really get to know them and understand their goals and dreams. We then work together to achieve their objectives in the most efficient way possible. Whether our clients need just one of our services to get where they want to go – or the 'full works', we give you complete flexibility, complete clarity and complete transparency in everything we provide. The services we provide are:



Investing for the Future

We believe that everyone should invest for the future. We also know that the world of investments can seem complicated and overwhelming at times with so many different ways to invest and so many different funds to choose from. We help our clients cut through this complexity, simplify their investments and make sure their investments really deliver.



Planning for Retirement

For a lot of people, retirement means stopping work. To us it means being able to afford the lifestyle our clients desire without the need to work. A secure, comfortable retirement is everyone's dream and because we're living longer we can expect to spend more time in retirement than our parents or grandparents did.



Buying a Property

For most people, a mortgage is the single biggest financial commitment they will ever make. Whether it is to fund the purchase of your own home, a buy-to-let investment or for your business, buying a property can be a stressful time. We're here to help our clients cut through the complexities and get the best possible mortgage.



Protecting Our Clients' Families

There is nothing in the world more precious to our clients than their family. It's the reason most of them go to work in the morning. They know we can't be without them, but we ask them what would happen to their family without them? What would happen if they lost their job or suffered a serious injury or illness?



Strategies for Older Age

Today, older people are healthier, more active and demand more from life than ever before. We think this is great news and to be welcomed but it does provide challenges for those thinking about how they will plan for their older age.



Holistic Financial Planning

Financial planning is all about our clients. We help our clients clarify their life goals and put plans in place to achieve them. Whatever our clients want to accomplish in life, a comprehensive financial plan will help them get there.



Growing Our Client's Business

For some of our clients, their business sits at the very heart of their finances. We can help our clients nurture, grow and protect their business to ensure it helps deliver them the lifestyle they need.



Philanthropy

For many successful individuals who have accumulated significant wealth, their attentions turn to giving something back. Using wealth for the benefit of others is now one of the key financial planning priorities for an increasing number of our clients. The most appropriate way to do this is often via planned philanthropy.

What Makes NorthStar Unique?

At NorthStar, we like to do things differently. We don't focus on selling products and earning commission. We put our clients' needs first every time. Clear, honest and open financial planning – the way it should be.

Our clients expect better service. We offer much more than many financial planners and always go the extra mile to deliver the very best service to our clients.

We believe there are a number of things that make our client proposition unique:



A Solution That Fits Our Clients' Needs

Our clients can bespoke their service and only pay for what they need with our unique range of financial planning and wealth management solutions.



Only the Very Best Advice

All our financial planners have been awarded the coveted 'Chartered Financial Planner' status – the gold standard financial planning qualification.



Market Leading Low Charges

By harnessing the latest technology we can deliver impressive efficiencies meaning our clients pay much less than with comparable services.



Access to Investments 24/7

Our clients can view and manage their investments any time, any place, using any device with our client portal – keeping them in total control.



Totally Transparent Charges

We are proud to display all our charges upfront on our website and are dedicated to complete charging transparency at all times

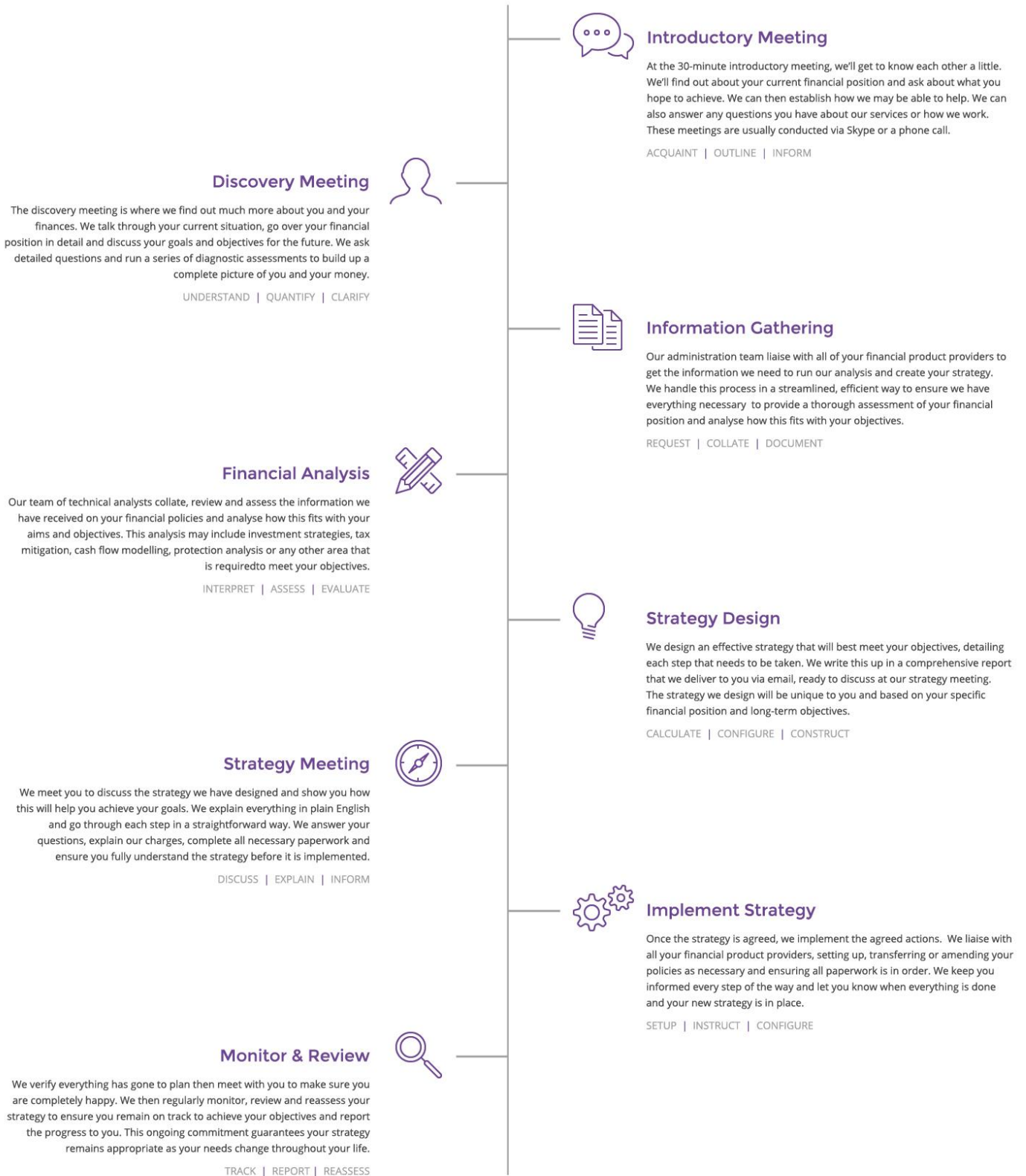


Advice Our Clients' Way

No mundane meetings or weighty financial documents – we use technology to deliver advice as our clients want it – face-to-face, phone & Skype

Our Advice Process

We have developed a clear, step-by-step advice process that really delivers results. Our process can be clearly and simply articulated to clients, ensuring they know what to expect at each step. This is how we explain our advice process to prospective clients:



Driven by Technology

The Client Portal

We provide access to cutting-edge technology that allows our clients to see their complete financial position in one place, 24 hours a day, 7 days a week – on any device.

They can track their investments anywhere, anytime with our award-winning software.

This allows them to manage their entire financial life in one secure place with our client portal – an innovative app and online tool available to all NorthStar clients. Our clients can see all their assets and accounts in one place 24/7 from any device, helping the track progress towards their financial goals.

Our clients can link up their bank, savings, pensions and investment accounts to get a complete picture of their finances and say goodbye to reams of paperwork with online document management.

The client portal is a complete financial management solution, helping our clients stay better informed, make great financial decisions and reach their goals faster.



The Key Feature of the Client Portal

Portfolio Details

Comprehensive view of all the policies and plans our clients hold including real-time valuations and holdings. Clients can analyse performance, review asset allocation and portfolio splits.

Banking Details

Option to link up all client bank accounts and credit cards, giving them a consolidated view of their finances in one convenient location.

Document Management

Our clients can store and view important documents in one online location and can share documents as needed. All files are encrypted and secure.

Secure Messages

2-way messaging system allowing instant and secure communication. This provides a simple way to send important and sensitive documents direct to NorthStar and for us to communicate securely with our clients.

Personal Details

Our clients can view all the personal details we have recorded for them plus they can edit and update information as needed.

ImpulseSave®

ImpulseSave® is a first-of-its-kind technology that helps our clients add money to their investments in an instant. Clients can add any amount from £1 upwards to their investments, any time they like.

Technology Partners

At NorthStar, we believe that effective technology should sit at the heart of every successful financial services business. We are committed to using the latest software, hardware and cloud-based technologies to enable us to provide an efficient, streamlined and robust service to our clients. We also require our technology partners to help us deliver the high level of functionality, reliability and service our clients have come to expect.

We have carefully selected a number of best-in-class technology providers to help us deliver an outstanding level of service to our clients. Each technology partner is continually evaluated to ensure they continue to provide the best quality service in their given field. In order to maintain such a partnership we expect great service, fast response and people that are able to help us solve problems when they occur.

We are proud to work with the following technology partners:



Company Structure & Ownership

Incorporated in 2014, NorthStar Wealth Management Group Ltd is an independently owned private limited company. The business started trading in early 2016 and has grown rapidly since. It is owned solely by the founders, James Thompson and Derek Pegg. The company operates no subsidiaries and has no holding company. NorthStar Wealth Management Group Ltd is registered in England and Wales under number 09069129.

About the Directors



James Thompson

Founder & Chartered Financial Planner

Working within the financial planning profession since graduating university in 1999, James started out in a technical role analysing pensions. After many years and after taking on many different roles, he found himself as the practice manager at an established financial planning firm, responsible for all day-to-day operations.

James is known for his relentless study schedule which saw him achieve the coveted 'Chartered Financial Planner' status in 2013, putting him amongst the elite financial planners in the country.

James co-founded NorthStar in 2016 with a commitment to providing an entirely new level of service to clients.

James heads up our financial planning team and is passionate about building client rapport and developing long-term relationships. His aim has always been to help his clients better understand their financial position and empower them to live better lives. As well as his planning role, James also heads up the compliance and technical departments.

Qualifications:

BA (Hons), APFS, Certs CII (MP & ER)
Chartered Financial Planner
Advanced Diploma in Financial Planning
Diploma in Financial Planning
Certificate in Life & Pensions
Certificate in Equity Release
Certificate in Mortgage Advice
Specialist qualifications in pensions, investments, protection and equity release
BA (Hons) degree in Economics



Derek Pegg

Founder & Chief Investment Officer

Derek graduated with a degree in economics in 2000. He went to work for a financial planning firm with responsibilities for investment management and product due diligence. As his career progressed, he gained a number of professional qualifications and took on greater responsibilities.

Derek went on to work for companies providing software and investment solutions to financial advisers and saw first-hand how effective systems can produce dramatic results.

Co-founding NorthStar in 2016, Derek realised his dream to create a truly unique financial planning firm that would help clients realise their financial goals by harnessing the latest technological advances.

With a drive for continually refining and improving our systems and the client experience, Derek is responsible for all aspects of technology, investment management and marketing within the company. Derek also heads up the NorthStar Investment Committee.

Qualifications:

BSc (Hons), Cert FP, IMC
Investment Management Certificate
Certificate in Financial Planning
BSc (Hons) degree in Economics

Accreditations & Trade Bodies



Financial Conduct Authority

The FCA regulate the financial services industry in the UK. Their aim is to protect consumers, ensure the industry remains stable and promote healthy competition between financial services providers. NorthStar is authorised by the Financial Conduct Authority (FCA). Our FCA number is 716709.

fca.org.uk



Chartered Financial Planner Status

All our advisers have been awarded the prestigious 'Chartered Financial Planners' status by the *Chartered Insurance Institute* (CII). This is a highly-prestigious designation with demanding qualification criteria. This title is only awarded to individuals committed to developing and maintaining their knowledge and capability so they can deliver the highest quality financial advice. Chartered individuals must also follow a demanding code of ethical practice. This means they must work in a principled manner that places clients' interests at the heart of all the financial advice they give. Chartered status, granted by the Privy Council, is the industry's gold standard for financial planners.

cii.co.uk/membership/chartered



Chartered Institute for Securities & Investment

The Chartered Institute for Securities & Investment (CISI) is the leading professional body for securities, investment, wealth and financial planning professionals. We are proud members of CISI and ensure the highest possible standards at all times

cisi.org



VouchedFor

VouchedFor is a leading independent professional rating and review service that allows genuine clients to rate their independent financial adviser. This service helps people to find the very best advisers in their local area through the use of reviews and a star rating system. You can check out our reviews and testimonials on VouchedFor via the NorthStar website.

vouchedfor.co.uk



Unbiased

Unbiased is the original (and probably best known) directory of independent financial advisers in the UK. Their service is popular with clients looking for advice and provides information as well as reviews of adviser in the proximity of the client. Unbiased are actively engaged in consumer education and stressing the importance of high quality independent financial advice. We have an active listing on Unbiased at all times. You can find this listing via the NorthStar website.

unbiased.co.uk



Federation of Small Businesses

The Federation of Small Business (FSB) was started in 1974. It now boasts over 185,000 members across the UK. The FSB aims to promote local small businesses and provides access to information, training, legal and other services as well as running seminars and regional events. We have been members of the FSB since forming NorthStar.

fsb.org.uk



Professional Indemnity Insurance

In accordance with the Provision of Service Regulations 2009, we hold Professional Indemnity Insurance at all times. This insurance is currently provided by Collegiate Management Services Limited registered at 18 Mansell Street, London E1 8FE.

collegiate.co.uk



Statement of Professional Standing

The Financial Conduct Authority (FCA) requires that all retail investment advisers now hold a Statement of Professional Standing (SPS). An SPS can only be issued by an FCA appointed accredited body, such as the CII, and confirms that an adviser has adhered to a code of ethical standards, holds the required qualifications for the activities they undertake and has completed appropriate CPD and complied with APER (Statements of Principle and Code of Practice for Approved Persons). You can see the SPS for our advisers in the NorthStar 'Document Library' on our website.

cii.co.uk/membership/obtain-your-sps

Treating Customers Fairly

About 'Treating Customers Fairly'

NorthStar are authorised and regulated by the Financial Conduct Authority (FCA). As part of the authorisation provided by the FCA, we are obliged to abide by the principles of 'Treating Customers Fairly' (TCF).

At the heart of TCF, is an expectation by the FCA that customers' interests should be at the heart of how firms do business. Customers should expect to get financial services and products that meet their needs from firms that they can trust.

As a business, we are dedicated to upholding the highest possible professional standards and providing a high quality service to all our customers. We have an ongoing commitment to follow all FCA best practice guidelines and to continually improve our systems, practices and client experience. The principles of TCF sit at the very heart of everything we do and shape the way we deliver our services and develop our business.

'Treating Customers Fairly' Outcomes

The FCA have set out a number of key outcomes which they expect to see from all authorised firms. These outcomes mean that:

1. Our customers can be confident they are dealing with a firm which holds the fair treatment of customers as central to our corporate culture.
2. Products and services marketed and sold are designed to meet the individual needs of our customers.
3. Our customers are provided with clear information and are kept appropriately informed before, during and after the point of sale.
4. Where we offer advice to our customers, the advice is suitable and takes account of their individual circumstances.
5. Customers are provided with products that perform as they have been led to expect, and that the associated service is of an acceptable standard.
6. Customers will not face unreasonable post-sale barriers imposed to change products, switch providers, submit a claim or make a complaint.
7. Any complaints or grievances are handled in a sympathetic, positive and professional manner with the outcomes of complaints acted upon.
8. Customer feedback is sought regularly to ensure we are meeting our TCF obligations and our customers are provided with services of an acceptable standard.
9. Any TCF failings are corrected as quickly as possible and systems and procedures updated to ensure any such failings do not occur in future.

Client Feedback & Ratings

We regularly survey all of our clients to find out what they really think of the services we provide. We ask them to rate us on a scale from 0 (worst) to 5 (best) in ten key areas. This information is aggregated to provide an ongoing client satisfaction assessment.

Overall Satisfaction

Average rating: 4.7 / 5



Value for Money

Average rating: 4.5 / 5



Documentation & Literature

Average rating: 4.9 / 5



Technical Knowledge

Average rating: 4.8 / 5



Professionalism

Average rating: 4.7 / 5



Customer Service

Average rating: 4.7 / 5



Technology & IT

Average rating: 4.6 / 5



Communication

Average rating: 4.7 / 5



Effectiveness

Average rating: 4.6 / 5



Likely to Recommend

Average rating: 4.7 / 5



All client satisfaction ratings cover the past 3 years to 01.01.18.

Client Testimonials



Christina E.
New Forest



"Very impressed with the warm, professional service. Everything from the personal contact to all the literature and website has been of the very highest standard. Will be recommending your company to friends & family."



Alan T.
Waterlooville



"I found the advice that NorthStar gave to be very helpful. It covered all the necessary points and demonstrated a good working knowledge. Following the work carried out by NorthStar, I now have the confidence to retire, knowing that my pensions and investments are being proactively managed. I have a real understanding of my financial position and a strategy for my retirement. I would recommend NorthStar to others without hesitation."



Maureen T.
Oxfordshire



"NorthStar has been wonderful. Our financial advisor has very good communication skills and seems extremely knowledgeable"



Camilla H.
Braishfield



"The service provided by NorthStar was excellent. I wanted to review the performance of an old pension fund. James was very approachable, explained all my options very clearly and I felt confident that he fully understood my objectives. I received regular progress updates and was pleased with the outcome, which has seen my pension moved online with lower annual fees and a projected higher return. I would definitely recommend NorthStar and James Thompson for any financial advice you might need."



Phil O.
Southampton



"I would like to say that after two meetings I have been impressed with the service. James Thompson explained our financial strategy in easy to understand terminology and we now look forward to further discussions to achieve our objectives in the future."

[View more: nswm.co.uk/kudos/feedback-ratings/](https://nswm.co.uk/kudos/feedback-ratings/)

Find Out More

To learn more about NorthStar Wealth Management, please visit nswm.co.uk, email info@nswm.co.uk or call us on 0800 6906 247 and we will be happy to answer any questions you have.

Specific information for our professional connections can be found at: <https://nswm.co.uk/contact/professional-connections/>.

NorthStar Wealth Management full contact details:

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Freephone: 0800 6906 247

Skype: nswmuk

Email: info@nswm.co.uk

Twitter: @ns_wm

Business Hours: 9am – 5pm (M-F)



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