

On the money

Money Wise, long-term sponsor of Bath Rugby, celebrate their 10th anniversary with a champagne reception

During August, local Independent Financial Advisers, Money Wise, celebrated ten years in business with a champagne reception at their Bath office. Started by Malcolm Coury and his wife Halena in 1997, the company is now one of the UK's top *150 IFA's, with offices in Bath and Bournemouth.

Malcolm, who has appeared regularly on the BBC programme *It's Your Money* is a pensions and investment specialist with over 20 years experience in financial services:

“The most important aspect of our company is to strive to exceed our clients' expectations”

“Relationships are key to our business because our clients entrust their money year after year in our safe hands, to help build and grow their future financial security. I believe the most important aspect of our company is honest relationships, keeping our promises, understanding our clients' needs and, above all, striving to exceed their expectations. It is this principle that has contributed to our success over the last ten years.”

Joining in the celebrations were both clients and friends from Bath Rugby. Having recently renewed their long term sponsorship, Tim Davies, commercial director of Bath Rugby, and new signings, Lorne Ward and Martin Purdy of the Bath first team joined the celebrations.

Tim Davies, commercial director for Bath Rugby wished Money Wise a happy 10th Birthday from all at Bath Rugby: “Money Wise has been a club sponsor and our official IFA for the last four seasons and we really appreciate their support. We congratulate them on their tenth anniversary and wish them continued success.”

Having worked with clients for over 20 years, the company's financial advisers provide exceptional financial solutions over a wide range of services including, investments, pensions, mortgages, protection and tax planning.



Money Wise staff with Bath Rugby players Lorne Ward and Martin Purdy

Robert Bailey a long term client of Money Wise comments: “By organising a simple personal mortgage for me over 10 years ago, my relationship with Malcolm has developed so much he is now the financial adviser for my business. I have always found the service very good, and his patience and understanding of both me and my business first class”.

As part of the celebrations, Money Wise is offering a prize draw to win three sets of two VIP tickets to a match in the forthcoming season. The prize includes seats in the Money Wise box and a champagne luncheon for six lucky winners. All new customers during August will be entered into the draw, with winners being announced on the first day of the new Rugby season. All winners will be notified in writing. □

For your Free, without obligation, consultation, call Malcolm Coury on 01225 471100.

Money Wise has also been nominated in the Bath Life Awards, Professional Services category, please go online and vote!

*Source: Plimsoll Publishing Limited



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Independent Financial Advisers

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