About MHA Caves Wealth

At MHA Caves Wealth, we endeavour to deliver positive outcomes through a combination of tailored financial planning and bespoke investment management, alongside consistent oversight of both elements to ensure alignment with client expectations.

Our methodology

We believe that the day to day management of a client's investments and the high level of ongoing advice we provide to help achieve their long term financial plan, are separate skill sets. We have therefore ensured that we maintain teams of both highly qualified financial advisers and experienced investment managers within the firm.

Our financial advisers are experts at putting together a long term financial plan with each client and revisiting it regularly to reassess and adjust for changing needs or circumstances. For our investment managers, on the other hand, their day to day focus is on looking after clients' portfolios, allocating between various asset classes and monitoring appropriate investments.

The significant benefit to clients of having all this expertise 'in-house' is that we are able to look after all our clients' investment needs; from setting them up with the right solutions to meet their current and future needs, to looking after the 'nuts and bolts' of the investments they hold.

This holistic approach is, we believe, key to ensuring the suitability and appropriateness of the recommended strategy on an ongoing basis.

Of course, some clients prefer to use individual elements of the service, such as portfolio management or financial planning on a stand-alone basis and this is easily accommodated. However, the vast majority see the benefit of combining our services to provide them with a wealth management service, which gives them peace of mind, and caters for their financial needs, today, tomorrow and into the future.

"Our service is based on the belief that financial advice should be provided by trusted advisers working solely in your best interests."

Now, for tomorrow

mha CAVES WEALTH

Our principles

Firstly, and most importantly, we believe in building long term client relationships. We always have done, and have many client families with whom we are dealing with the second, or even third, generation. The cornerstone of our professional service is the personal touch. We don't believe in faceless call-centres or automated telephone answering systems. Our clients are allocated a personal adviser, available at the end of the phone, or in person, at our office or in your home.

Financial advice

We provide the full range of services; from investments to pensions and savings, from protection policies to life assurance, school fees and estate planning, ensuring that whatever your stage of life, we can help you with your changing goals and objectives. Our service is based on the belief that financial advice should be provided by trusted advisors working solely in your best interests.

With no links to other investment houses our advice is completely impartial and independent, ensuring that we can provide the very best solution for your personal circumstances.

Stockbroking

If you simply wish to buy and sell shares, corporate and UK government bonds at your convenience, and would like a high quality telephone service with friendly, experienced stockbrokers, as long-standing members of the London Stock Exchange, we shall be pleased to help.

Discretionary investment management

Appointing an investment manager to look after your investments is clearly an important decision. At MHA Caves Wealth we have been advising private investors, trusts and charities on the construction and management of their portfolios for many years, gaining a wealth of experience to put at your disposal.

We can offer advice and recommendations across the full range of different asset classes, securities and investment vehicles - a truly comprehensive service. Our highly qualified team of investment managers ensure that your portfolio meets your personal objectives and select the most appropriate investments for your individual circumstances.

Our advice is completely impartial"

Risk Warning

The price and value of investments and their income may fluctuate. Past performance should not be seen as an indication of future performance. You may not necessarily get back the amount you invested. Foreign markets will involve different risks from United Kingdom markets and in some cases the risks will be greater. The potential for profit or loss from transactions on foreign markets, or in foreign denominated contracts, will be affected by fluctuations in foreign exchange rates. The value of property investments are generally a matter of a valuer's opinion rather than fact. In addition, property investments may not always be readily saleable and there may be constraints on cashing in units.

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