

Wealth Management



Our approach ensures that our wealth management expertise is always delivered by people who have taken the time to get to know you and your business. Here are 5 reasons to choose Hallidays...



Trust

We've over 170 years of experience at seeing your bigger picture and knowing how best to handle your specific situation.



History

We have clients who have trusted us for generations. Why? Because we have proved that we can take the long view and help achieve financial goals.



Reputation

We are determined to get your financial planning right. This ensures your financial future and our excellent reputation both remain intact.



Transparency

With our transparent fee structure, you are not charged for fund switching; instead we can agree an annual fixed fee to look after your affairs.



Clarity

We use plain English and avoid jargon so that you can be certain about what is being proposed and recommended. Full understanding is our aim.





All of our services and products are designed to meet your hopes, needs and aspirations. You just need to tell us what you want from your future, and we'll do everything we can to help you achieve it.

Estate Planning

We don't want you to worry about the potential impact of Inheritance Tax on your estate for a single second. Instead leave it to our taxation experts at Hallidays to find every possible solution to any issues.

Pensions

Whether you would like help with your personal pension, or guidance on auto-enrolment for your business, we will review your existing pension arrangements to ensure you have peace of mind that everything is in place to support you and your employees.

Taxation

Our tax review gives us the perspective to see all the opportunities that will benefit your investments, pensions and retirement planning. This approach means that you are able to plan your tax payments and achieve your goals more quickly.

Investment

By getting to know you, we will be able to understand your attitude towards risk, this means we can select investments and services that are exactly right for you. We will also completely review your existing investments and ensure they are working hard for you.

Savings

Whether you have been saving for a special event or just for a rainy day, we can offer advice on the best ways to invest this money. Our experts will help you choose the most suitable investments to help your savings grow faster.

Insurance

We will carry out a thorough assessment of any life or health policies that you currently have. So if your health is affected you don't have to worry about the financial implications for your family or your business.

Changing to Hallidays is easy



Step 1

Give us a call on 0161 476 8276



Step 2

Make an appointment for your FREE Financial Review



Step 3

Relax.
Leave the rest to us!

“ At CDS our company pensions have been managed by Hallidays for over 12 years. Our team have benefited from the security of knowing the future of themselves and their families are being looked after. ”

Hallidays Financial Services Ltd is authorised and regulated by the Financial Conduct Authority



Bill Lea
New New Ltd