INTIME
FINANCIAL PLANNING

Financial Planning with Purpose

Saving you Tax, Time & Worries

Jack Basford Dip PFS

Founder & Financial Planner

I am truly dedicated to making a positive impact as a modern and empathic Financial Planner in 2024. Having founded InTime Financial Planning in 2022, my mission is crystal clear — to offer peace of mind and secure futures in our dynamic world. Prior to this venture, I honed my skills at two of the nation's top Independent Financial Advisory firms, shaping an effective approach to Financial Planning that delivers tangible benefits.

With a successful track record of managing the financial affairs of 300 families, overseeing £40m in investments and pensions, I am excited to bring this wealth of expertise to guide you toward financial success and security. My purpose is rooted in providing you with the assurance that decisions made today will withstand the test of time, enabling you to live your best life.

This commitment is the cornerstone of my achievements and will persist throughout the course of our clients' lives. I am devoted to ensuring your financial freedom, opening up opportunities for you to achieve everything you dream of.

Our Core Values

These are the values which are integral to our vision. Together they create a modern & progressive financial advice service capable of changing lives for the better.

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Independence

Independence is crucial in everything we do. We provide a unique service that guarantees a completely customised outcome for you.

Integrity

Our compassion drives us to put your best interests first. We commit to making a positive impact on your life through integrity & understanding.

Lifestyle Led

Your InTime Financial Plan will deliver measurable benefits to your life. We can show you how financial success translates into lifestyle success.

Technology

We leverage cutting-edge financial systems & techniques to maximise your outcomes and ensure you stay ahead of the game.

Longevity

The best advice is timeless. We ensure that the advice you receive is suitable for today and benefits you and your family for a lifetime.

We are here to assist you throughout all stages of your life.

Prosperous Growth

Are you a successful professional or entrepreneur without a savings plan? Let us help you save for the future without sacrificing your present enjoyment.

Compose & Construct

Considering retirement? Our comprehensive financial plans cover pensions, investments, cash, businesses, and property. Plan for your dream retirement with us.

Leisure & Pleasure

Your hard work is done. We help ensure your perfect life without financial stress. Your retirement is secure with us. Our plans deliver comfort and peace of mind.

What is a Financial Plan?

*You can have a **PLAN** without **ADVICE**,*
*but you shouldn't accept **ADVICE** without a **PLAN**.*

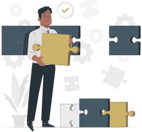
Combining the Pieces of Your Financial Puzzle...

Income, expenses, property, pensions, investments, cash, insurance & more.

We're changing the Financial Advice game.

We provide advice and guidance on all elements of your financial lives in order to ensure everything is working efficiently and in complete cohesion with one another.

Allowing you to kick back and live life the way that you want.



The Hourglass

Essentially, we think of your Finances like an Hourglass. Inflow & outflow in constant motion.

Our job is to provide you with the evidence you need to enjoy life without ever worrying about your Hourglass running empty.

We save you tax and help you achieve more from life with your money.

Our Process

1. Initial Discovery Meeting

No obligation meeting, to discuss your needs and help you define your financial goals.

2. Information Gathering

Once we understand you as a person, we get to know your existing investments and pensions.

3. Research & Analysis

We independently assess your current position using the most modern & innovative Financial Planning methods.

4. Develop the Financial Plan

Our research is refined into a detailed & comprehensive InTime Financial Planning Report that'll help you achieve your life goals.

5. Presentation & Implementation

At this second meeting, we ensure you are fully satisfied with our findings before proceeding to implement your plan on your behalf.

6. Ongoing Monitoring & Servicing

On an annual basis, we will review your Financial Plan to ensure you stay on track to achieve your goals despite changing global conditions.

Our Financial Planning Fees

Fair Costs for Great Outcomes

Initial

Our Initial Financial Planning services have an minimum initial fee of £1,500 for new clients.

If your advice results in assets under our direct supervision, additional implementation fees will be based on a percentage of the amount we will be servicing on your behalf.

Up to £200,000	£200,001 to £500,000	£500,000+
2.0%	**1.5%**	**1.0%**

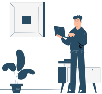
Ongoing

Our Financial Planning services have a minimum fee of £1,000 per year.

This fee is calculated as a set percentage of your assets under our supervision, with no tier structure. The fee is set at 1.0% per year, payable monthly for all clients.

Per annum

1.0%



Testimonials

Mr & Mrs Genz – Property Developers

Jack revolutionised our perception of financial advisors with his profound knowledge and innovative approach. His insightful advice has not only greatly improved our personal lives, but also transformed the way we do business. We are forever grateful for his invaluable advice.

Mrs Millennial – Managing Director in Law

Finding a suitable advisor who understood my life's priorities proved to be a challenging task until I discovered Jack! Not only does he have the knowledge required to help me save tax, but more importantly he also ensures that I can enjoy my life today.

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Thanks!

Do you have any questions?

enquiries@intimefp.com
07723 928799
https://www.intimefp.com

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