ROXTON WEALTH

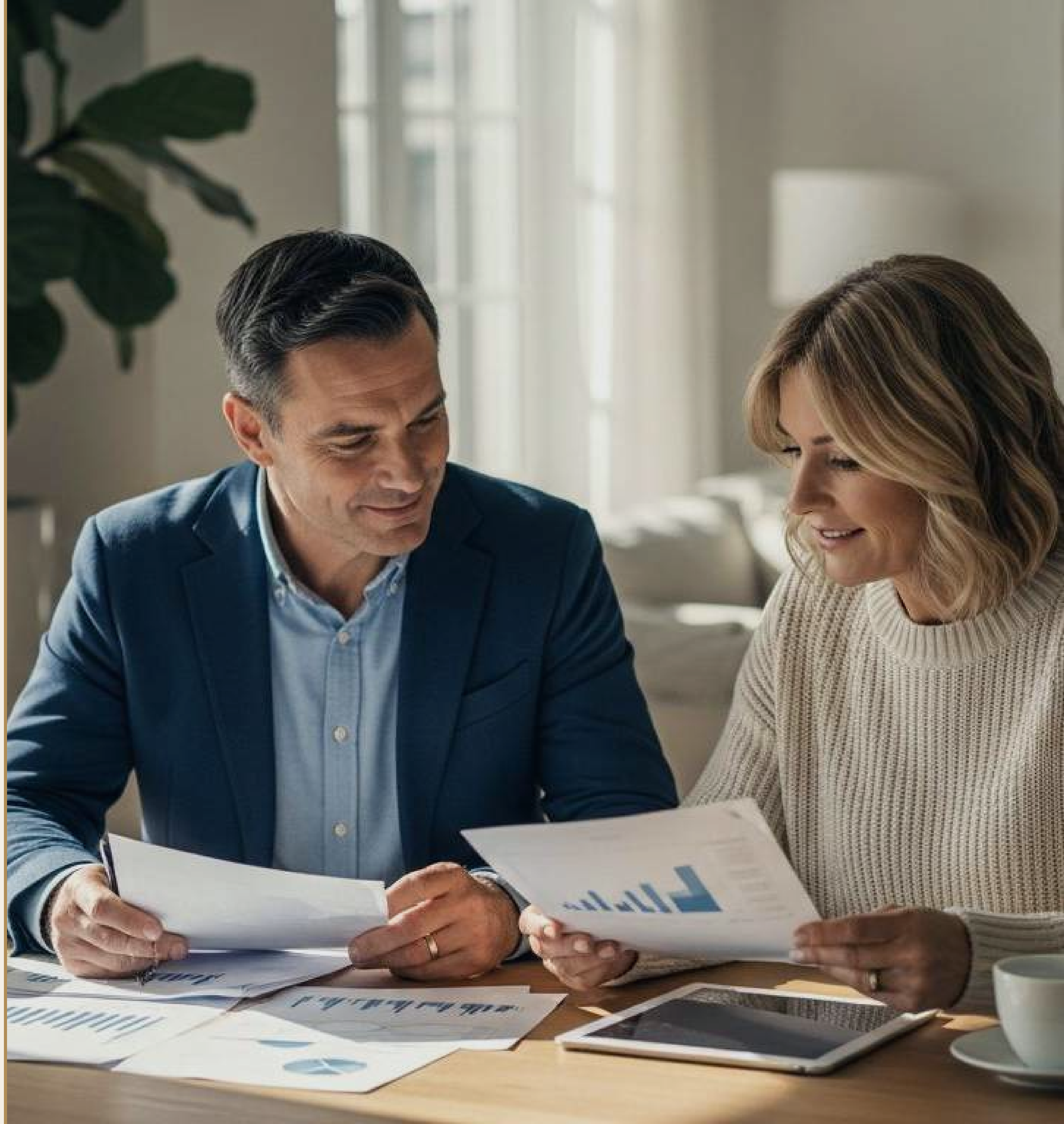
AN INTRODUCTION

Roxton Wealth

Financial and mortgage advice built around real life.

WWW.ROXTONWEALTH.COM

Financial & mortgage advice, tailored to you



WELCOME

Advice should feel human.

Finance often feels overwhelming, and many people delay important decisions because the industry can feel intimidating and disconnected from real life. We believe it does not have to be this way.

Roxton Wealth was built to challenge traditional financial services. Good advice should create clarity, not confusion. Finance should fit people, not force people to fit finance.

> *"We created Roxton Wealth because we believe financial advice should start with understanding the person, not just the numbers."*
>
> — NOURAN, FOUNDER

OUR DIFFERENCE

Finance that fits you.

THE TRADITIONAL MODEL

Product → Sale → You made to fit

THE ROXTON WAY

Understand you → Plan around you → Advise with clarity → Confidence

We start with your life, your goals and your worries — then build the advice around them.

BEHAVIOURAL FINANCE

Money is emotional, not just mathematical.

Real financial decisions are shaped by feelings, habits and life events. We plan for the human being, not just the spreadsheet.

Buying a first home

Excitement and pressure can lead to rushed decisions on the largest purchase of your life.

Receiving an inheritance

Grief and responsibility make it hard to think clearly about what to do next.

Starting a family

New priorities and new worries change how you think about security and the future.

Approaching retirement

A lifetime of saving meets uncertainty about whether it will be enough.

THE ADA APPROACH

Built for different ways of thinking.

Everyone processes information differently. Our advice is designed to be understood by real people — clear, patient and free of jargon.

A

Accessible

Plain language, no assumptions, and time taken to make sure it makes sense.

D

Different

We adapt to how you think and learn, not the other way around.

A

Adapted

Communication and pace tailored to your needs at every step.

OUR SERVICES

How we help.

01 **Mortgage advice**
First homes, moving, remortgaging and buy-to-let.

02 **Protection**
Protecting your income, family and home.

03 **Pensions & retirement**
Planning for the future you want.

04 **Investments**
Growing your money with a clear strategy.

05 **Savings & goals**
Building towards the moments that matter.

06 **Estate & legacy**
Passing on wealth with care and intention.

OUR CLIENTS

Who we help.

We work with people at every stage of life — whenever a financial decision feels bigger than a spreadsheet.

- First-time buyers
- Growing families
- Business owners
- Professionals
- Later-life planners
- Those inheriting wealth

A LIFETIME OF ADVICE

20s · 30s · 40s · 50s · Retirement · Legacy

OUR APPROACH

A considered journey.

01

Discover

We take time to understand your life, goals and worries.

02

Clarify

We turn complexity into a clear, honest picture.

03

Plan

We build a strategy shaped entirely around you.

04

Recommend

We advise with transparency and no pressure.

05

Implement

We handle the detail and keep you informed throughout.

06

Review

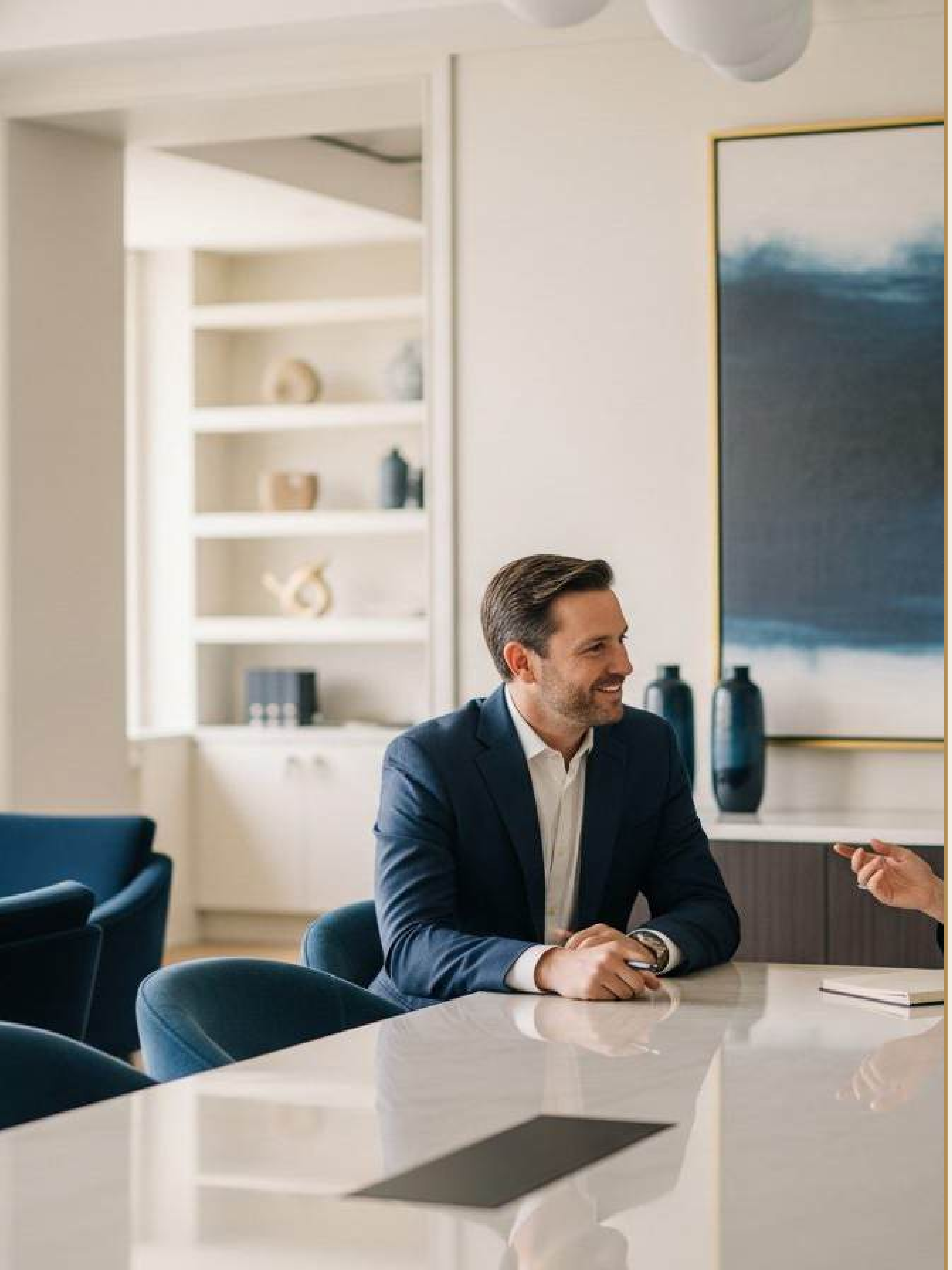
We stay with you as life and priorities change.

THE DIFFERENCE

Why choose Roxton Wealth.

TRADITIONAL ADVICE	THE ROXTON WAY
Product-led conversations	Person-led understanding
Jargon and complexity	Clarity in plain language
One-size-fits-all	Advice built around you
Transactional relationships	A relationship for life

Highly qualified advisers · Transparent & honest · Genuinely independent · FCA regulated



GETTING STARTED

Your first conversation.

01 We listen — to your situation, your goals and your concerns.

02 We explain how we can help, clearly and without pressure.

03 You decide, in your own time, whether it feels right for you.

The first conversation is free of charge and without obligation.

What we believe.

Advice should start with the person.

Finance should create clarity, not confusion.

Trust is earned, never assumed.

Good advice lasts a lifetime.

"We do not want to be your financial adviser for a single transaction. We want to be the people you turn to for life."

— NOURAN, FOUNDER

ROXTON
WEALTH

Let’s start a conversation.

TALK TO US

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FOLLOW US

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TikTok · YouTube — @roxtonwealth

Rated by clients on VouchedFor

Remote appointments UK-wide, plus bespoke in-person meetings.

Risk warnings & regulatory notice.

RISK WARNINGS

Your home may be repossessed if you do not keep up repayments on your mortgage. The Financial Conduct Authority does not regulate most buy-to-let mortgages. Equity release will reduce the value of your estate and can affect your eligibility for means-tested benefits. The value of investments and pensions, and the income they produce, can fall as well as rise. You may get back less than you invested. Inheritance and estate planning is not regulated by the Financial Conduct Authority. Bridging finance is typically a short-term, higher-cost form of borrowing and carries risks, particularly if the planned exit strategy is not achieved. A clear repayment strategy should be in place before entering into any agreement. Commercial bridging finance is not regulated by the Financial Conduct Authority.

REGULATORY NOTICE

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