

Magenta

FINANCIAL PLANNING

Planning with Passion

Magenta Financial Planning was established in 2016 and is based in Bridgend. We are a team of Chartered and Certified Financial Planners. We are passionate about providing clients with bespoke financial planning advice, so that they can have the confidence to make financial and life decisions with clarity.

We believe it's important to break down taboos and fears around discussing money and pride ourselves on helping people understand the complex nature of finance, by making things easy to understand.

We're specialists in giving financial advice to all types of clients and help them to feel more in control of their finances and gain confidence. We can provide advice on all types of specialist solutions, including pensions, investments and life and health protection.

What is Financial Planning?

Financial planning is much more than pensions, investments and financial products.

It's different to traditional financial advice which usually focuses on your money and investment performance rather than you as a person.

Financial planning looks at the bigger picture, at your life as a whole, your hopes and dreams for the future. It's about creating a long-term plan to help you to achieve everything you want in life with the money you have.

How does Financial Planning apply to me?

Money is the fundamental ingredient of many of our ambitions, so effective planning and management of it is critical to the successful achievement of our goals.

It can help answer life's big questions like: What do I want to do with my life? When can I afford to retire? What income will I need? Can I afford to make gifts to my family?

A good Financial Plan will consider the essential relationship between your money and your life and will provide you with the solid infrastructure necessary to build a successful and happy future.



Chartered

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or email: hello@magentafp.com





Gretchen Betts

Managing Director (CFP, APFS)

Gretchen has been advising for 15 years and holds the highest level of financial planning qualifications available in the UK.

She's passionate about encouraging open conversations about money and helping clients to understand how to manage their own money and their future.

She sits on the local branch committee of the Chartered Institute of Securities & Investments in Wales and was also named Nextgen Planners Ambassador in 2018.

In her spare time she loves to craft and travel.

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Magenta's awards

Since launch the business has won multiple awards, including:

- 'Start up Company of the year 2017' from the Bridgend Business Forum
- Professional Adviser's 'Financial Adviser of the year (Wales)' in 2017 and 2019
- 'Accredited Firm of the year 2017' from the Chartered Institute of Securities and Investments (CISI).
- For the last 3 years Magenta has been listed in the Top 100 Financial Adviser firms, published by New Model Adviser, winning the NMA Adviser firm of the year Wales 2018.

A proud Chartered Financial Planning Firm

This is the profession's gold standard for firms of financial planners. It confirms that we have satisfied rigorous qualification criteria by retaining highly-qualified staff committed to continuing professional development and adherence to a Code of Ethics.

Magenta is very proud that Gretchen also holds the individual Chartered Financial Planner qualification. There are only 6,800 individual Chartered Financial Planners and only 715 Chartered Financial Planner firms in the UK (out of nearly 26,000,) indicating that this is a highly exclusive award reserved for the leading firms.

At Magenta we are very proud of the work we do and that it is acknowledged throughout the profession

