Ocean Tree
Financial Planning

A pillar of stability in the
ever-changing tides of finance

WHO WE ARE

We are your **Local, Independent** Financial Planning Company

Mark and Jason are a dynamic team of certified financial planners with a combined experience of over 40 years in the industry. Together, they hold a wealth of experience, with specialised qualifications in retirement and investment planning, as well as expertise in mutual funds, variable annuities, insurance, and tax planning. They provide comprehensive financial solutions tailored to the individual needs of each client, helping them achieve their financial goals.

5 KEY STEPS OF FINANCIAL PLANNING

1. GETTING TO KNOW YOU

Getting to know you allows us to take a holistic approach, considering various aspects of your life to create a well-rounded financial plan. In return, you get to know us and how we can help you.

2. YOUR GOALS AND DREAMS

We will discuss and identify your financial goals such as retirement, children's education or building a financial nest egg, prioritise them and inform you on the steps required to turn your dreams into a reality.

3. PROVIDE A RECOMMENDATION

We will analyse all the information to produce a recommendation. We want your money to work harder for you and provide the greatest returns possible within your risk appetite.

4. IMPLEMENTING YOUR STRATEGY

We will complete all administration, produce all of your documentation and process your application in house. This is when your financial plan comes alive and part of your exciting future.

5. CONTINUED COMMUNICATION & REVIEWS

We offer savings and investment options that are versatile and adaptable and provide ongoing wealth management services including; portfolio management, full reporting services, reviews, communication with clients and providers and online access to your investment portfolio.

WHAT WE OFFER

We have selected a number of leading investment institutions that can provide you access to a diverse range of financial solutions.

REGULAR SAVINGS

LUMP SUM INVESTMENT

By investing your money in regular and/or single contributions, we help you to meet your bespoke needs such as:

RETIREMENT PLANNING

CHILDREN'S EDUCATION

FINANCIAL NEST EGG

PENSION TRANSFERS

FUTURE HEALTHCARE

UNIVERSAL SAVINGS PLAN

OUR PRODUCTS

We can access a very broad range of products to tailor to the individual client. Whether you are of modest means or a high net worth individual, we can work to your budget.

MUTUAL FUNDS

STRUCTURED NOTES

STOCKS, SHARES & ETF'S

HEDGE FUNDS

MONEY PROTECTION

We are registered and regulated by the Bermuda Monetary Authority. Fully licensed under the Investment Business Act 2003.

BMA
BERMUDA MONETARY AUTHORITY

We only deal with leading, highly regulated financial institutes, who provide the highest levels of protection on your savings and investments.

WHO CAN BENEFIT?

Anyone residing in Bermuda can benefit from our services. Bermudians, the expat community and anyone internationally Mobile.

Assets can be held in various dominant currencies including US Dollars, Pound Sterling, Euros, Japanese Yen, Swiss Francs, Australian Dollar & Hong Kong Dollar.

We can devise a strategy to your risk appetite, accommodating time horizons from 5 to 40 years. Minimum lump sump investments are $5,000 and minimum regular contributions are $300 pm. There is no maximum on how much you can invest with us.

CONTACT US

To request a comprehensive assessment of your financial situation, please get in touch.

We look forward to helping you on your journey to financial freedom

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