

# Hamilton

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Hamilton is a planning-led advisory firm offering clear, personalised financial advice across the whole of the market. We help individuals, families, and businesses make confident decisions about their money whether you're preparing for retirement, growing your wealth, or protecting your estate for the next generation. Our advice always starts with your goals. We take time to understand your financial position, values, and priorities, then build a tailored financial plan to match. This may include tax-efficient strategies using ISAs, pensions, investment bonds, VCTs or EIS; inheritance tax planning; cashflow modelling; gifting; retirement income planning; or business succession advice. We support clients through all stages of life from early-career professionals and business owners to those already in retirement. For clients who want ongoing support, we offer low-cost, long-term investment management. Our portfolios are built using carefully selected funds often including investment trusts and are designed for sustainable growth, with regular rebalancing and a strong focus on value and diversification. But this is optional. Our core planning service stands on its own, and many clients work with us for advice only. We are fully independent not tied to any provider, fund, or platform and there's no minimum investment to work with us. Our fees are clear, fair, and agreed in advance. We don't do jargon or sales pressure just thoughtful advice and long-term relationships built on trust. Whether you need help with pensions, ISAs, retirement planning, tax strategy, protection, or passing on your wealth, Hamilton is here to help you plan with purpose and act with confidence. Website:  
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