

Guy Marshall

Estate Planner
Partner at Buckingham Gate



Guy's Qualifications

CII Advanced Diploma in Financial Planning
CII Diploma in Regulated Financial Planning
CII Certificate in Discretionary Investment Management
CII Award in Long Term Care Insurance
CII Level 6 Personal tax and trust planning
CII Level 6 Retirement income planning
CII Level 6 Investment planning
CII Level 6 Financial planning process

www.buckinghamgate.co.uk

Guy is an Estate Planner and a Partner at Buckingham Gate Estate Planning.

Guy knows from personal experience in his own family how inheritance tax and the probate process add unnecessary burdens at what can be a very difficult time following the death of a loved one, and he is keen to help people navigate this successfully.

To achieve this Guy can help clients through all phases of Estate Planning, from the initial planning phases, through to implementation and finally dealing with probate and advising beneficiaries.

Estate Planning and Trusts, can sometimes be seen as complex and often as the preserve of the very wealthy however, Guy believes that many families can benefit from taking the time to ensure that their family legacies are protected and preserved for generations to come.

In addition to estate planning, Guy is a qualified Financial Planner who works closely with the team at In2 Planning and Arcrate, an award-winning investment management firm. Therefore, he can address matters relating to investment and financial planning too, if required (a separate client agreement and terms of business would be supplied for this work).

Guy has 25 years' investment experience with major financial institutions. He has seen the highs and lows of investing through financial cycles and uses this to help clients take a long-term view.

Guy is married with three children and when not working pursues his love of music, which is mostly classical, but he is very open to suggestions from the younger generation too.



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