

alexander beard
Group of Companies Limited

Global Reach, Local Service.

www.abg.net

abo



Hello & Welcome

to the Alexander Beard Group of Companies Limited

Welcome to the world of the Alexander Beard Group of Companies, a business that I founded in 1987 and continue to lead.

Over the years our forte has been to deliver our ideas, products and services to clients who work in specialist fields such as music, sports and entertainment, globally mobile expatriates, employees of international schools and charities, families who emigrate as well as small business owners and high net worth individuals in the United Kingdom.

This brochure will give you a high level view of our specialities and more detailed information can be obtained from our website www.abg.net.

On behalf of everybody who works in our company around the world we look forward to serving you both now and in the future.



With Kind Regards

Paul D Beard
Executive Chairman
pdb@abg.net

Our Ethos

Our ethos is quite simple: to deliver good advice, explained in a straightforward manner, at a proper price, and to sustain that initial service with high quality ongoing information and regular contact.

Paul D Beard - Executive Chairman

About Us

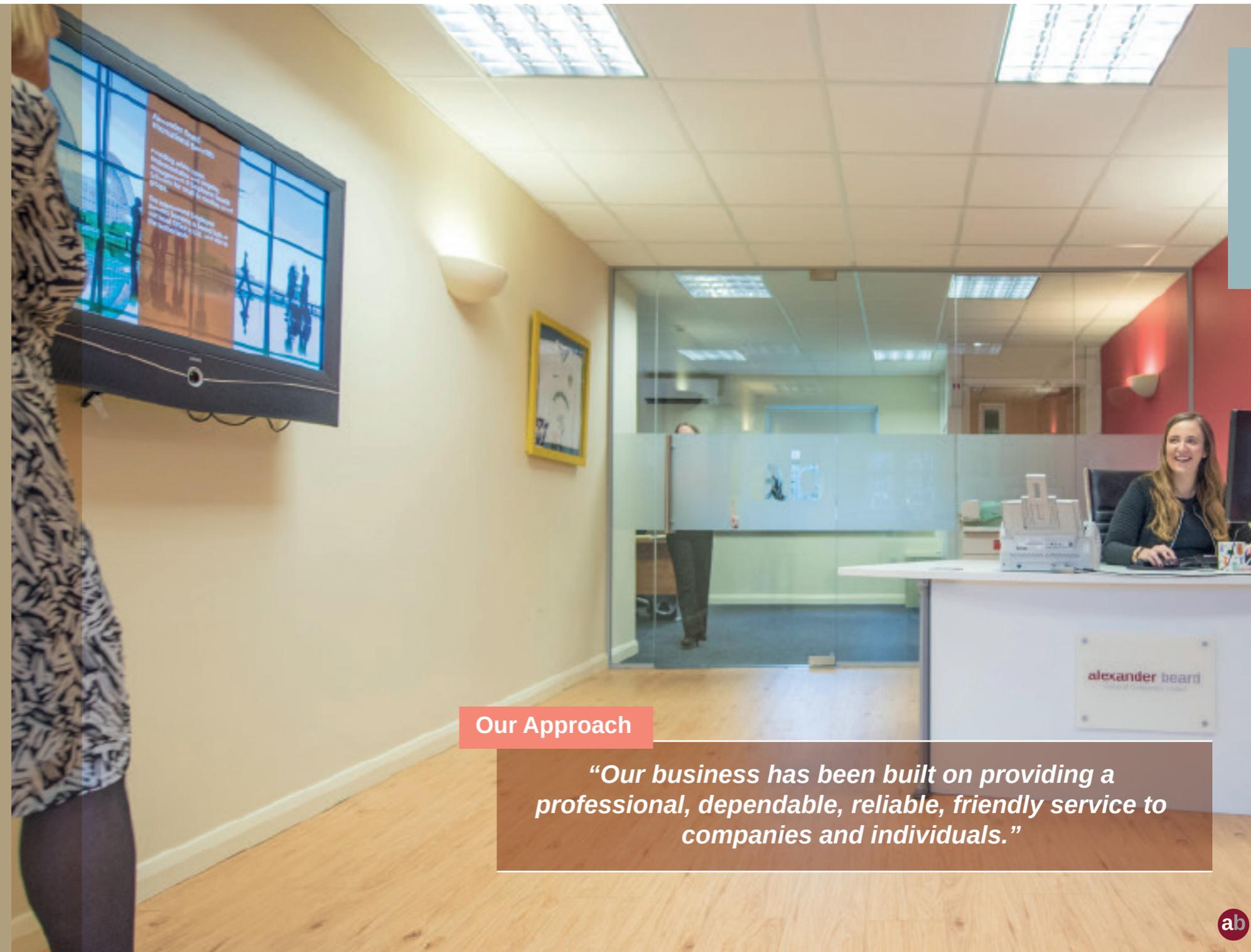
Why choose the Alexander Beard Group

Our aim is to combine a global reach with the values of local personal service, whether we are providing employee benefits or wealth management services, international retirement plans or expatriate pension transfer.

We have offices in strategic locations around the world, details of which can be found on the back of this brochure; each one of these offices is properly authorised and regulated by the appropriate local regulatory authority.

We offer a broad range of services which are tailored to specific needs and specific types of clients. We have always believed that by servicing specific areas, specific demographics and specialist requirements, we can provide a much more focused and professional service rather than trying to be a "jack of all trades"; this has served us well as the company has grown from one man in a small office to a business with over 60 staff in 6 countries.

Our unique combination of specialism, specific knowledge of certain market sectors and a wide range of expertise across our directors, partners and staff has set our company apart in the areas in which we work. We believe it is the primary reason why the vast majority of our clients stay with us throughout their personal and professional lives.



Our Approach

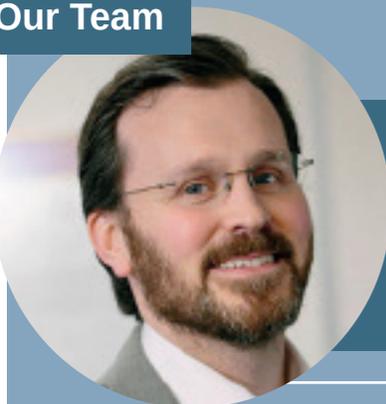
“Our business has been built on providing a professional, dependable, reliable, friendly service to companies and individuals.”

UK Financial Planning and Wealth Management for both personal and corporate clients

Through our UK offices, Alexander Beard Wealth LLP provides a range of personal financial planning services, investment management, partnership and director risk insurances and portfolio management.

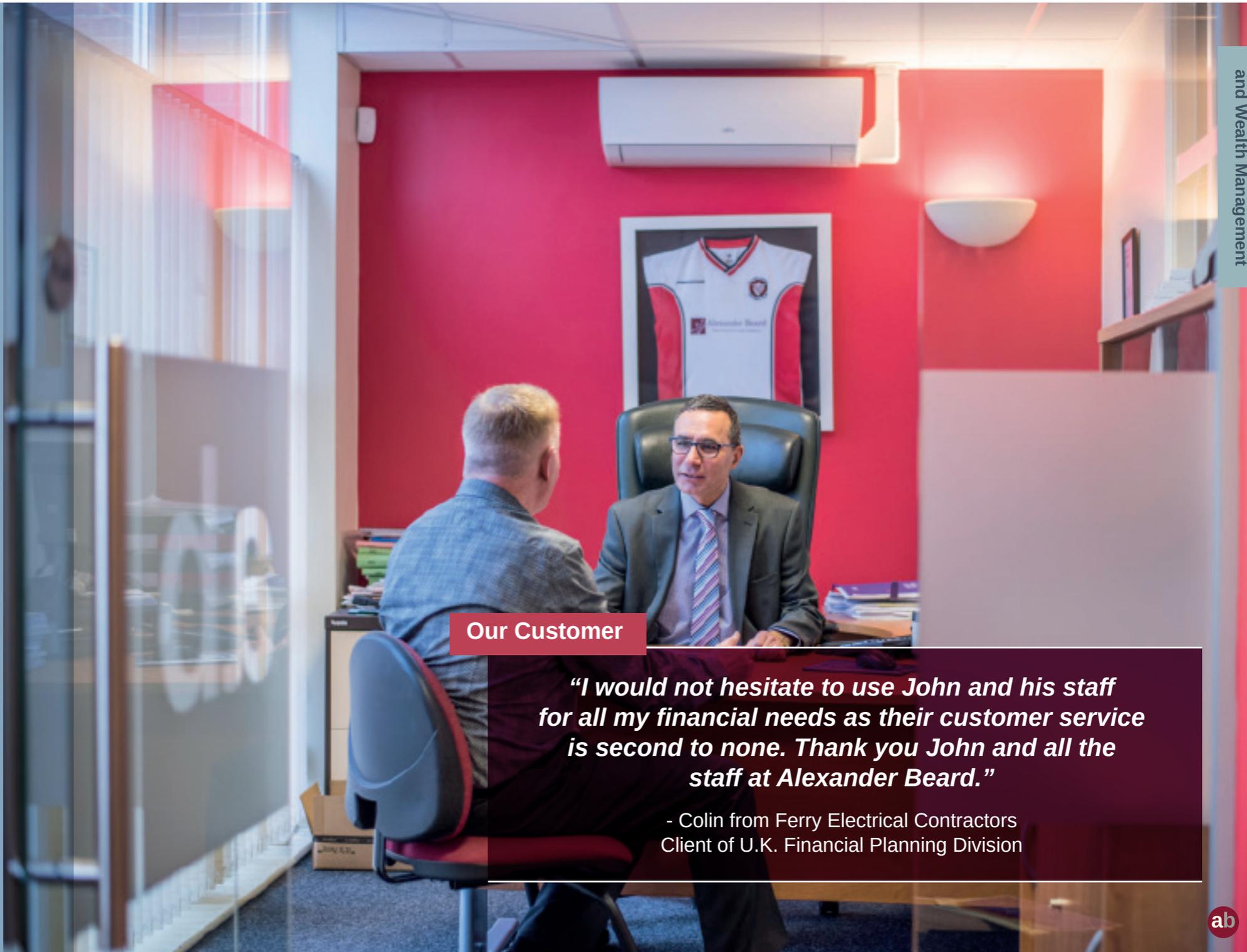
Our services include managed portfolios, regular investment contracts, mortgages, life insurance and pension's management. For business owners we can provide additional advice on director and partnership insurance policies as well as personal life and critical illness plans. Alexander Beard Wealth have had since the outset of the firm 30 years ago a well acknowledged speciality in advising clients in short lived careers such as music and entertainment and professional sport and indeed this is the bedrock on which the group was founded and is a market in which we continue to thrive.

Our Team



Contact for ABG Wealth LLP

Andrew Moore
Investment Director and Partner
andrew.moore@abg.net



Our Customer

"I would not hesitate to use John and his staff for all my financial needs as their customer service is second to none. Thank you John and all the staff at Alexander Beard."

- Colin from Ferry Electrical Contractors
Client of U.K. Financial Planning Division

Global Financial Services with a global reach local to you

With offices on 4 continents Alexander Beard Global Services has two specialist divisions:

International Schools and NGO's For the past 11 years Alexander Beard has built a growing reputation in providing international retirement plans for the globally mobile employees of international education establishments and charity and NGO organisations. This plan has grown considerably during that time and we now have over 50 participating organisations, with employees working as far afield as South America, North America, Southern and Eastern Europe, China, South East Asia, the Middle East and Africa. In addition to this we provide a specialist specifically tailored international healthcare plan for any organisation working in difficult and challenging surroundings.

Expatriate & Emigration Services Our expat and emigration services are delivered primarily through ABG's regulated offices in France, Johannesburg, Perth and San Francisco. We specialise in expats of all nationalities but predominately British expats in the USA and Australia, South African expats in the USA, Australia and the UK and a growing client bank with the French expatriate community in the UK built upon our 2014 acquisition of *Lepretre and Partners Limited*. All our international offices are correctly authorised and regulated at their local level and staffed by experienced advisers who have an in-depth understanding of local market places, taxation and other relevant considerations. It has long been our adage that we "look after you wherever you go" and "look after what you have left behind".

Should you be emigrating, our knowledge in the overseas pensions transfer market is second to none. With changing rules and regulations surrounding this marketplace we can provide up to date, knowledgeable and trustworthy advice needed in this important area of pension and asset transfers for people who emigrate.

Hannah Chorley
Admin Manager
UK Head Office

Our Team

Contact for Global Financial Services

Lesley Stevens
Sales Director - Int'l Education & NGO
info@abg.net



Our Customer

***"Thanks again for your service.
We appreciate your straightforward answers and
honesty, and look forward to working with you to ensure
financial security for our retirement."***

- Catherine Wimpey, Client of International Schools & Humanities Division

International Benefits

Why choose A.B.I.B?

A.B.I.B was launched in 2006 primarily to deliver a full service employee benefit proposition to USA headquartered companies that had small to medium sized groups of employees working in the UK.

This service has been so successful that we have since expanded it to Holland and France, first with the merger of *Bogaard Pensioen B.V.* in 2015 and then the opening of our third international benefits office in France in 2016. Since then we have added representation in Germany and we plan further office openings to extend our range in the very near future.

Consulting and working with clients' home country advisers, we provide integrated packages of health, life and disability coverage as well as setting up appropriate pension arrangements for local staff. This comes with all the necessary attendant investment and administrative services that a client would expect including 24/7 online valuations and our much lauded **StaffChoice** portal.

Our Team

Contact for International Benefits

Bram Bogaard, Managing Director:
Europe - AB International Benefits B.V.
Bram@abg-nl.net

Our Customer

"The Alexander Beard team has been a strong partner of ours for the past several years. They have great attention to detail and is a strong strategic partner for our employees. Given the overall positive experience, we've also recently expanded our services with Alexander Beard to France and Ireland."

- Palo Alto Networks
Client of Alexander Beard
International Benefits B.V.

Holly Potts
Client Relationship Director
International Benefits

alexander beard

Group of Companies Limited

In the United Kingdom

Alexander Beard Investment Management Limited is authorised and regulated by the Financial Conduct Authority, reference No. 225566. Registered in England, No. 4216659.

Alexander Beard Wealth LLP (FCA Reference No. 665406), registered in England, No. 0C342152, is an appointed representative of Alexander Beard Investment Management Limited.

Alexander Beard Global Services Limited (FCA Reference No. 7765002), registered in England, No. 4873038, is an appointed representative of Alexander Beard Investment Management Limited.

Alexander Beard Global Services Limited has two divisions: Alexander Beard International Education & NGO, registered in England, No. 04873038 and Alexander Beard Expatriate Services.

Alexander Beard International Benefits B.V. (UK office) is deemed authorised and regulated by the Financial Conduct Authority. Details of the Temporary Permissions Regime, which allows EEA-based firms to operate in the UK for a limited period while seeking full authorisation, are available on the Financial Conduct Authority's website. FCA Reference No. 725120.

Registered offices: 14-16 Rossmore Business Village, Inward Way, Ellesmere Port, Cheshire, CH65 3EY

In Australia

Alexander Beard (Australia) Pty Ltd trading as Alexander Beard (Australia) and Dave Stone are Authorised Representatives of Sentry Financial Services Pty Ltd ACN 113 531 034 AFS Licence 286786.

In France

Alexander Beard (France) SAS is registered with the French trade register under nr. 818839227, is a registered advisor in financial investment (Conseiller en Investissement Financier-CIF) appointed by the national association of financial advisors ANACOFI-CIF (Association Nationale des Conseillers Financiers-CIF) under nr E008399 and regulated by the French financial markets authority (Autorité des Marchés Financiers - AMF), is a registered broker regulated by the banking and insurance sectors' supervisor (Autorité de Contrôle Prudentiel et de Résolution – ACPR), is an intermediary in banking transactions and payment services (Intermédiaire en Opérations de Banque et Services de Paiement – IOBSP).

In The Netherlands

Alexander Beard International Benefits B.V. is gevestigd te 's-Hertogenbosch, KvK 's-Hertogenbosch nr. 60817410. Alexander Beard International Benefits B.V. staat als financieel dienstverlener in het kader van de Wet op het financieel toezicht geregistreerd bij de Autoriteit Financiële Markten, nr. 12043464.

In South Africa

Alexander Beard RSA (Pty) Ltd. is authorised by the South African Financial Sector Conduct Authority (FSCA).

In the United States of America

Alexander Beard (USA) Inc., is a registered investment advisor with the California Department of Business Oversight; Insurance License 0C00578. 44184.

Alexander Beard Group of Companies Limited, registered in England No. 2144184.

UK offices: Cheshire (Head Office), Yorkshire & London

International offices: Den Bosch, Johannesburg, Lyon, Perth & San Francisco

For more detailed information on the services we offer
please visit www.abg.net

Alternatively, email info@abg.net or call +44 (0) 151 346 5460

