tba Wealth Managment

We provide high-quality, expert financial advice designed to support and protect your wealth. Now and for the future.

Find out more

Integrated Expertise

By bringing together financial planning, accounting and corporate finance under one roof, we deliver a coordinated approach that reflects the full complexity of your financial affairs.

A highly personal service

We take time to understand your priorities, family circumstances and ambitions, creating a bespoke strategy built around what matters most to you.

Independent, FCA-regulated advice

Our independence allows us to offer objective, transparent recommendations from across the whole market, carefully selected to align with your goals and objectives.

A relationship built for the long term

With over 40 years of experience, we focus on building long lasting relationships grounded in trust, discretion and continuity of advice as your needs evolve.

Get in touch with us

020 8661 7878

advice@turpinba.co.uk

Advisors you can trust

tba Wealth Management

We are a long-established firm of independent financial advisers, providing expert, discreet financial planning to individuals, families and business owners.

At tba Wealth Management, our approach is built on understanding. We take the time to listen carefully to your needs, priorities and aspirations, so we can deliver tailored personal advice designed around you.

Financial wellbeing underpins many of life's most important decisions. With careful planning and the right advice, we can help you protect, grow and pass on your wealth with confidence.

We offer advice across a broad range of areas, including:

- **Retirement and pension planning**
  Structuring your wealth to support the lifestyle you want, now and in the future
- **Savings and Investment**
  Creating and managing investment strategies aligned to your objectives, risk profile and timescales
- **Personal and business protection**
  Safeguarding you, your family and your business against the unexpected
- **Equity release**
  Unlocking property wealth in a considered and appropriate way
- **Inheritance tax and estate planning**
  Helping you preserve and transfer wealth efficiently across generations

What our clients say

"I have been receiving financial advice from Martin Card and his Wealth Management team for several years and I have been nothing but impressed with their quality of advice, courtesy and confidentiality. I have gained from the experience and understand more about how to improve my personal finance situation as a result. I have no hesitation in recommending TBA Wealth Management to prospective clients."

Richard Nicholls

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Our Approach

tba Wealth Management

Effective financial planning is not defined by short-term decisions, but by the long-term outcomes it delivers.

At tba Wealth Management, we take a structured and considered approach to managing your wealth, focusing on preserving, growing and protecting it over time.

Understanding you

We begin by gaining a clear picture of your current position and priorities as well as your short, medium and long-term objectives.

Creating a tailored strategy

Using this understanding we develop a bespoke financial plan designed to align your wealth with your ambitions, balancing opportunity with an appropriate level of risk.

Ongoing advice and review

As your circumstances and the wider environment evolve, we provide continuous advice and regular reviews to ensure your plan remains aligned and on track.

We provide a free initial consulation with no obligation to commit

Financial Protection

Financial Protection

A robust financial plan is not only built to grow your wealth, but to protect it.

Life is unpredictable, and unforeseen events can have a significant financial impact. Ensuring that you, your family and your business are protected against these risks is a key part of long-term planning.

Whether through loss of income, illness or unexpected change, the right protection arrangements can provide financial security and continuity when it matters most.

We provide independent, whole-of-market advice to identify protection solutions that are aligned with your circumstances, priorities and level of cover required.

At every stage of life, from building a family, to growing a business, to planning for retirement, we help ensure your financial plans remain secure.

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Savings and Investments

Savings & Investments

Preserving and growing wealth requires a disciplined approach adhered to over time.

Holding excess cash over the long term can diminish purchasing power, particularly in an inflationary environment. A well-structured investment strategy ensures your capital is working hard to support your objectives.

We work with you to understand your attitude to risk, time horizon and tax position to create a tailored investment approach designed to balance risk and return appropriately.

With access to a broad range of investment solutions, we provide clear advice to help you navigate complexity and make informed decisions with confidence.

Whether you are building wealth, generating income or seeking to enhance returns on your cash, we ensure your investments remain aligned with your wider financial strategy.

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Pensions

Pensions

Retirement planning is essential to maintaining your desired lifestyle in later life.

Pensions remain one of the most tax-efficient ways to accumulate wealth, offering valuable reliefs and long-term growth potential. However, navigating pension legislation, contribution limits and investment choices can be complex.

We provide advice to help you structure and manage your pension arrangements effectively, ensuring they align with your broader financial plans.

Whether you are building your retirement provision, reviewing existing arrangements or starting to draw money from your pensions, we can help you make informed decisions with clarity and confidence.

Early and proactive planning can make a significant difference, helping to ensure that when the time comes, your retirement reflects your expectations.

For those already accessing their pension, advice can still play an important role in shaping long-term outcomes.

Equity Release

Equity Release

For many individuals, a significant proportion of their wealth is held within property.

Equity release can provide a way to access this capital without the need to move, offering additional flexibility in later life.

When appropriate, it can be used to supplement retirement income, fund significant expenditures, support family members or restructure existing finances.

As a long-term commitment, it is important to fully understand both the benefits and implications, particularly in relation to your estate and future plans.

We provide clear advice to help you explore your options and determine whether equity release is suitable for your individual circumstances.

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Estate and Inheritance Tax Planning

Estate & Inheritance Tax Planning

Effective estate planning ensures that your wealth is passed on in line with your wishes, while preserving as much value as possible for future generations.

It is not simply about tax efficiency, but about providing clarity, control and security for those you care about most.

We offer tailored advice to help structure your affairs in a way that protects your assets and supports the smooth transfer of wealth.

By considering options such as trusts, lifetime gifting and available allowances, we create strategies designed to mitigate inheritance tax and maximise the value of your estate.

Our approach provides reassurance that your legacy is managed appropriately and in accordance with your long-term intentions.

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Other services available from turpin barker armstrong

About tba

Turpin Barker Armstrong is a firm of accountants, licensed Insolvency Practitioners and Independent Financial Advisors providing a range of expert financial services to businesses and individuals.

With a proven track record, we are committed to providing the highest level of customer service to help with your personal or business finances.

Our Services

- Accountancy & Tax Planning
- Code of Practice 9 - Tax Investigations
- Making Tax Digital
- Tax Enquiries
- Corporate Recovery & Turnaround
- Personal Insolvency
- Corporate Finance

“Right from my initial contact (which was replied to within the hour) TBA have been thoroughly professional and very quick to respond

I would be happy to offer my full recommendation to anyone requiring the services of TBA”

Wealth Management Case Study

A well-established, cash-rich company with multiple directors sought advice on how to utilise surplus capital efficiently.

We provided guidance on the timing of pension contributions, selected an appropriate provider, and recommended an investment strategy aligned with the directors’ long-term objectives.

An initial contribution of £480,000 was made, resulting in a corporation tax saving of approximately £91,200, with further contributions of over £300,000 planned.

This approach enabled the directors to extract profits in a highly tax-efficient manner while strengthening their long-term retirement provision.

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Your wealth, thoughtfully managed

At tba Wealth Management, we believe financial planning is about more than managing wealth, it is about providing clarity in complex situations, confidence in decision-making, and continuity over the long term.

Whether you are planning for the future, protecting your assets or considering the next stage of your financial journey, we are here to provide specialist advice every step of the way.

Start a conversation

If you would like to discuss your circumstances in confidence, we would be pleased to arrange an initial, free no-obligation consultation.

T: 020 8661 7878
E: advice@turpinba.co.uk
W: www.turpinbawealth.co.uk

Authorised and regulated by the Financial Conduct Authority.