Property

We can arrange insurance for the buildings and contents of a range of properties including city apartments, town and country houses and estates, holiday and overseas homes.

Art, Antiques and Jewellery

We can advise on specialist cover for art, antiques and jewellery including collections.

Motor

We are able to arrange cover for private vehicles you may own: everyday cars, weekend cars, classics, sports and super cars.

The Oval group is one of the fastest growing providers of financial services and insurance broking in the UK. Oval is backed by Caledonia Investments plc and has created a national group by hand-picking some of the UK's best regional companies who already had excellent reputations in their areas, strong relationships with providers and sector leading specialists in their teams. These carefully selected companies are part of the Oval group; built by people who believe service is just as important as solutions.

To discuss your personal financial or insurance needs please telephone 0845 217 3511

Details of all our offices can be found on our website at www.theovalgroup.com/contactus

OVAL Financial Services

OVAL Insurance Broking

Oval Financial Services Limited
Registered Office address:
9 South Parade
Wakefield
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WF1 1LR

Tel: 01924 371 991

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Registered in England No: 02192234

Oval Financial Services Limited is authorised and regulated by the Financial Services Authority.

Registered in England No: 01195184

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You can check this on the FSA's Register by visiting the FSA's website on www.fsa.gov.uk/register or by contacting the FSA on 0845 606 1234

OVAL

Financial Services

Private Clients

Oval Financial Services

Holistic Approach

Oval Financial Services
With offices located around the UK, Oval can offer a tailored holistic planning approach to suit most investors' needs. With us, you will have a personal adviser, who will take time to get to know you and your requirements, ensuring you receive quality advice and service.

We like to take a holistic approach towards client advice. Just as areas of life, leisure and work overlap, so many financial planning goals overlap and interact. Planning for your financial future requires a long-term strategy and a long-term relationship with your personal adviser is essential to help you achieve this.

Our private client consultants are knowledgeable and well qualified. They keep their knowledge up to date via a planned programme of learning and development.

As part of our complete planning approach, we are happy working in conjunction with your other professional advisers to ensure that all areas of your planning needs are catered for.

Many of our clients appreciate this level of service. We know this because many of our new clients have been referred to us by existing clients.

Life & Health Insurance

Life & Health Insurance are still a fundamental part of financial planning - but are areas that are often overlooked or under appreciated. Ensuring that you and your family are adequately provided for and protected in the event of death, sudden illness or longer term illness and care is one of the key stages of planning. Whilst such plans are often assessed in terms of cost alone, added benefits, policy features and trust planning are issues that also need careful consideration.

Tax Planning

Whether your aim is to reduce your tax spend by effective income, capital gains or inheritance tax mitigation plans, or making best use of tax breaks and tax efficient planning schemes, efficient tax planning forms a cornerstone of financial advice.

Investment Planning

Saving for a rainy day, investing a nest egg or creating a means of income from your investments, we can assess your risk balance and tailor plans or offer portfolio management services to suit your short, medium and longer term needs.

Retirement Planning

Whether you are still in the process of saving towards retirement or reaching the point at which you wish to draw your benefits, the range of options and alternatives available has never been greater.

Business Planning

For many business owners, the distinction between personal planning and business planning can be quite hard to draw. Time spent assessing the financial issues affecting both you and your business in relation to the above key areas can mean the difference between success and failure, security or lost dreams.

Oval Insurance Broking

Rest assured

As well as investment advice and planning being offered by Oval Financial Services, we also have a Private Clients Insurance Division which specialises in providing the same personal and holistic approach for your insurance needs.

When you are passionate about the finer things in life, insurance can become a complicated issue. In order to provide the very best of service and advice to our clients who own exclusive homes, fine art and prestige motor cars, we ensure that our team have specialist knowledge and they also share the same passion for these items as you.

At Oval we are close at hand to discuss your insurance needs and as we have offices located around the UK, advice is never far away.

At Oval Insurance Broking, you will have a personal client manager, who will take the time to get to know you and your requirements, ensuring you receive a quality service.

After your client manager has had the opportunity to understand your individual requirements, they will work with you to tailor an insurance programme specific to your personal needs, often simplifying things for you and making savings in time and money. Whatever your needs, you can rest assured that we will strive to find the right product at a competitive premium.