

Brewin Dolphin Limited
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**BREWIN
DOLPHIN**

Introduction

Brewin Dolphin has served clients across Cumbria and Dumfries since 2006. We have always prided ourselves in building enduring and trusting relationships with our clients. Founded in 1762, we are here to help you achieve your ambitions through expert, personalised advice. This is achieved by offering an Integrated Wealth Management service which allows our clients access to both our [Financial Planners](#) and [Investment Managers](#).

Capabilities

If you are looking for support across both financial planning and investment management, our Integrated Wealth Management offer helps you to prepare for and realise your ambitions.

Whether you are clear on your financial priorities or feel you need to be pointed in the right direction, our Financial Planners can work with you on your financial plans and help you to realise your goals.

The world moves quickly, and ensuring your finances are working hard for you takes real expertise. Our Investment Managers can manage that complexity for you and provide investment advice that helps you make the most of your wealth.

We cater not only to private individuals, but also intermediaries such as solicitors and accountants, as well as a range of charities, trusts and pension funds. We offer help with products such as ISAs, SIPPs and offshore bonds as well as the more traditional equity investments and share portfolios managed on a discretionary basis.

Disclaimer: The value of your investments and any income from them can fall and you may get back less than you invested

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