

Independent Financial Advisers



rigby

Financial

Trust us for life

rigbyfinancial.co.uk

Your Future Our Priority



As Independent Financial Advisers, we understand that financial planning looks different for everyone.

Whether you are looking for specialist advice for your personal, business or family wealth, including pensions and protection services, our financial advisers are here to deliver tailored solutions and guide you throughout your financial planning journey.

With decades of experience across both personal and commercial financial planning, we combine expert insight with a refreshingly personal approach.

Your goals are unique - we believe your financial advice should be too.



Rigby Financial

About Us



Rigby Financial is a family-run, independent insurance and financial advice firm.

Established over 45 years ago, the business has grown in size and reputation and is now run by the founder's two sons, Simon and Andrew.

While much has changed since those early days, one thing has always remained the same – our values.

We pride ourselves on providing independent, expert advice delivered with a personal touch.



5.0 ★★★★★
Google Reviews

Our success is built on reputation.
Check out our 5-star reviews on Google.

77% of people
believe they are better off
thanks to good financial advice

According to a survey carried out by Censuswide on behalf of Aviva.

How Can We Help?

Personal Services



We offer a comprehensive range of personal financial planning services designed to help you build, manage, and protect your wealth.



Retirement Planning & Pension Reviews

Review existing pension plans and retirement savings to ensure they align with your goals.



Mortgages

First-time buyers, remortgages, buy-to-let investments - simplify your mortgage journey with expert advice.



Investments & Wealth Advice

Build and manage a tailored portfolio to grow and protect your wealth. ISAs, trusts, inheritance tax - maximise your wealth by minimising unnecessary tax liabilities.



Estate Planning

Protect your legacy and ensure your assets are passed on according to your wishes.



Protection Solutions

Safeguard your family, income, and lifestyle with tailored insurance cover for life's eventualities.

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How Can We Help?

Commercial Services



We offer a full suite of commercial financial planning services designed to help your business grow, manage resources efficiently, and safeguard its financial future.



Corporate Planning, Employee Benefits & Pensions

Optimise workplace pension schemes to secure employee retirement benefits and efficiently manage employer obligations.



Director Retirement Planning & Succession Advice

Strategically plan for retirement and ensure smooth leadership transition.



Business Protection & Key Person Insurance

Safeguard your business against the financial impact of the unexpected loss of critical personnel.



Business Investments

Identify and manage opportunities to grow and diversify your company's capital.



Commercial Mortgage & Lending Solutions

Tailored financing options to support business growth and property investments.

Why Us?



An Independent Financial Adviser

We'll help you get your finances in order - and work with you to keep them that way. With personalised guidance focused solely on your goals and delivered with clarity and simplicity.

-  **The Personal Touch**
No call centres, no jargon. We'll get to know you on a personal level to offer advice and guidance, tailored to your unique financial needs.
-  **Unbiased Advice**
We work for you, not a bank or provider, meaning our advice is only ever influenced by your needs.
-  **More Choice**
With access to the whole market, we will ensure you find the best fit to secure your financial future.
-  **Business & Personal Expertise**
From SME finances to personal wealth - we connect the dots, so nothing gets missed.

Our Experts

Meet The Advisers



We believe in putting a face to the name...



Simon Rigby
Managing Director

BA DipPFS



Jeremy Caderbank
Director

DipPFS



Josh Brannan
**Paraplanner and
Mortgage Adviser**

DipPFS

Secure Success

How We Work

Your advice journey:

- **Getting to know you** – we start by taking the time to really understand your personal circumstances, your goals, and how comfortable you are with risk.
- **Research** – we explore the whole market to identify the options and strategies that best fit what you're trying to achieve.
- **Your recommendations** – using everything we've learned, we put together a tailored plan and carefully selected funds designed around your needs and ambitions.
- **Talking it through** – we'll walk you through our recommendations in plain English, explaining the benefits, costs, and any potential risks so you can make informed decisions with confidence.
- **Putting everything in place** – we handle the paperwork and deal with providers on your behalf, making the set-up as smooth and hassle-free as possible.
- **Annual review** – each year, we'll check in on your progress, review any changes in your circumstances, and fine-tune your plan to keep you moving toward your goals.



39%

of UK adults don't feel confident managing their money.

According to the Financial Capability Survey carried out by the Money & Pensions Service.



CLEAR GOALS = BETTER OUTCOMES

People with a documented financial plan are significantly more likely to build long-term wealth.

Trusted By Individuals & Businesses

Client Testimonials

“

**JOHN
MCKNIGHT**

“...from preparing pensions and savings to ensuring I am making best use of my funds. Everything is proactive and reviewed annually. If I have any questions they are answered immediately.”

”

**P & A
PROJECTS
LIMITED**

“The entire team are always very professional, courteous and efficient with the range of services they provide.”

rigby

**JESSICA
BEST**

“...helped me with my financials and helped to explain all of the confusing technical terms so that it's all less daunting!

“Thoroughly recommend!”

What Now?

Let's Talk

Whether it's for you or your business, if you're looking for expert financial guidance, investment advice, or simply want to make sure everything's on track, we'd love to hear from you.

Get in touch today and let's build a stronger financial future together.



Online

Email: ifa@rigbyfinancial.co.uk
Send a DM via our socials.



Call

Talk to us now by calling the team on
01744 886077.



Come In

Visit our head office:
4b Millbrook Business Park, Mill Lane,
Rainford, WA11 8LZ.

We also have a Southport office:
3 Upper Aughton Road, Birkdale, PR8 5NA.

Prefer us to come to you?
No problem, just get in touch.

More?

Insurance Services



Rigby Financial also offers independent commercial insurance services, covering:

- Liability
- Property and material damage
- Professional indemnity
- Cyber
- Fleet
- High-net-worth
and more...

Get In Touch

Tel: 01744 886077

Email: enquiries@rigbyfinancial.co.uk



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