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Debbie Burridge

PRIVATE CLIENT CONSULTANT

Area of Expertise

Investments

I am a Private Client Consultant assisting clients to manage their financial affairs.

This means I run legal and financial health checks. The latter means I prepare a consolidated asset statement so clients have a clear picture of their position. This statement can be a useful tool when estate planning. The legal health check allows us to check the status of a client's will, enduring powers of attorneys, and memorandums of wishes.

I manage and administer the investor database of investors in each syndicate and the sale and purchase of syndicate units or mortgage investments. I also manage the change of name process.

The firm offers a Home Office Service, which I manage. This service offers clients peace of mind in the management and control of multiple assets, particularly financial assets.

For over 15 years and prior to raising a family, my career was in merchant banking, chiefly with Citibank in Auckland and London. So, I have a deep understanding of financial instruments. And, I work closely with my colleagues in the trusts and estate departments so we can develop a comprehensive and holistic plan, which encompasses the clients' estate planning requirements.

My clients trust and respect me. I have integrity, and I proactively assist my clients. For each client, I adopt a practical approach to find the best solutions. But importantly, clients appreciate me going the extra mile to make this world of endless compliance and paperwork seem as painless as possible.

My goal is for you to see me as a trusted confidant providing clear and practical advice. If you are looking to invest, sort out your affairs, do some estate planning, or discuss other financial opportunities, talk to me.

Glaister Ennor
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