Personalised Advice and Services Built Around

Your Business

At The Heritage Partnership, we believe that careful planning is key for business owners, trustees, charities, and family offices, to ensure long-term financial security for the business and stakeholders.

We offer complete financial planning services for corporate clients, with the benefit of a single relationship. Instead of dealing with multiple providers, we work in partnership choosing appropriate services, allowing your time and resources to be focused on core business activities.

From solutions for enhanced corporate and employee benefits to financial education programmes for your employees, we can work with you to implement a tailored plan that meets your legal requirements while protecting your business from any potential risks.

Our 4 Pillars of Commitment

- Personal in our approach
- Taking Proactive steps
- Strong morals and being Principled
- Seeking Prosperity for you and our community

Our Range of Corporate Services

Group Health Insurance

Bespoke and affordable coverage for your employees and their dependants, structured from a wide range of products and services offered by our international panel of providers.

Corporate Insurance and Shareholder Protection

Protection plans to ensure business continuity in the event of a shareholders serious illness, injury or death.

Workplace Pension and Investment Schemes

Well-designed plans that are portable and cost-effective; allowing you to attract, reward and retain key employees.

Investment Management

Delegate control of your investments, through our access to St. James's Place advisory and discretionary investment management services that can be tailored to your needs.

Group Life, Critical Illness and Disability Cover

Important benefits that not only form a key part of a comprehensive employee benefits package but also enale you to manage your business more effectively.

Key Person Insurance

An essential part of corporate protection which covers the financial impact due to the loss of a key person, through the payment of a cash lumpsum.

Financial Wellness Programmes for Employees

Customisable workshop programmes designed to equip your employees with the proper knowledge and understanding to manage their own finances effectively.

Cash Management Service

Access to market-leading fixed term deposits across multiple banks; capital and return guaranteed.

Financial Wellness Programmes for Employees

Working in collaboration with your company or business unit, we can create a tailored Financial Wellness Programme that is specifically designed for your group of employees. The Programme is delivered through a range of interactive workshops focusing on financial topics that are in line with the desired outcomes for your employees. We also provide your team with access to a leading provider of personal financial guidance without any obligation to meet with one of our advisers or use our services. The aim is to empower your employees with the right knowledge and understanding to effectively manage their own finances, so that you benefit from a more focused, productive and happier workforce.

Financial Education - The Key Life Stages

Getting Started

Aimed at providing education to individuals who are in the early stages of their career, on managing income, budgets, savings and purchasing a property.

Usually within the 18-30 age bracket

Changing Circumstances

For individuals with established careers who may have started a family and require financial education on savings and protection needs.

Usually within the 30-40 age bracket.

In Your Prime

To equip those who are in the prime of their career and likely to have older children, with knowledge on accelerated retirement savings and buy-to-let properties.

Usually within the 40-55 age bracket.

Nearing Retirement

To support individuals who are in the mature stage of their careers, and looking forward to a full or partial retirement.

Usually above 55 years old.

www.theheritagepartnership.asia

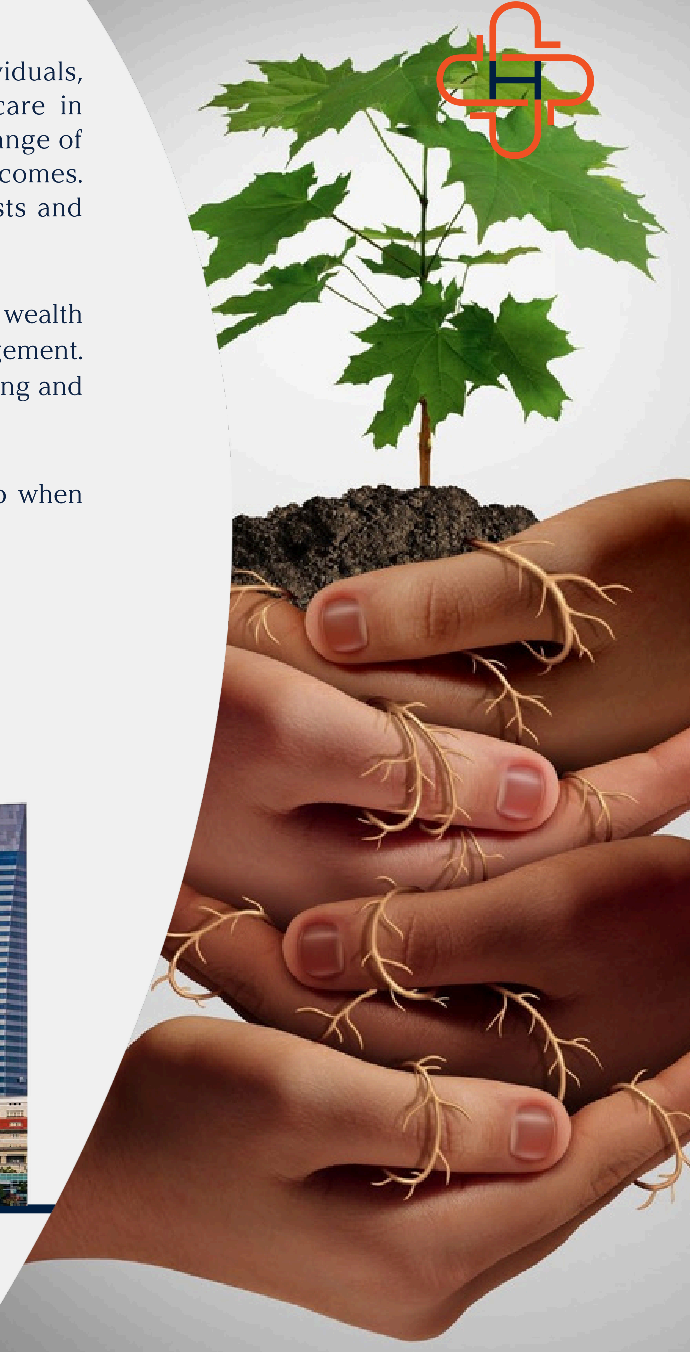
About Us

The Heritage Partnership specialises in bespoke, goals-based financial advisory for affluent, high net worth individuals, family offices, trustees, charities and businesses. We bring together financial planning experts that take great care in building you a lasting legacy. Working in unison, we are with you at every step as your life evolves. The team's wide range of expertise and industry experience in different aspects of wealth management empowers us to deliver you greater outcomes. To ensure the quality of our work our advisors are supported by a team of highly experienced investment specialists and administrative support professionals.

The Heritage Partnership is a Senior Partner Practice of St. James's Place Wealth Management, a leading FTSE 100 wealth management company with over £188.56bn (approximately S$324.32bn – as at 31 March 2025) of funds under management. Serving over 1m clients worldwide, St. James's Place has offices across the UK, and internationally in Singapore, Hong Kong and the Middle East.

Your Advice Guarantee - St. James's Place guarantees the suitability of the advice given by The Heritage Partnership when recommending any of the wealth management products and services available from companies in the group.

Building a lasting legacy with you.



The Heritage Partnership
Senior Partner Practice of St. James's Place (Singapore) Private Limited

Contact us on the details below to speak to a Partner at The Heritage Partnership who will help you put in place a financial strategy to meet your corporate visions and goals.

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St James's Place