



Private Banking in Scotland

THE WEATHERBYS WAY



WEATHERBYS
PRIVATE BANK

Background

Weatherbys Private Bank has continued the tradition of its parent company, founded in 1770, of looking ahead and innovating, while also maintaining a focus on providing excellent personal service.

As an independent family-owned business we are free to deliver what we know our clients value most: a one-to-one relationship with a banker you know who is always easy to contact and quick to respond.

Our Clients

Our clients come from all walks of life, from entrepreneurs to estate owners, and across sports to arts and entertainment and to those simply enjoying retirement. We look for clients who share our values and for whom our levels of exceptional personal service are of the upmost importance.

When you join Weatherbys, you join our family. We treat all our clients as individuals and take the time to understand your specific needs and circumstances — we can then provide you with tailored financial support for your lifestyle and future plans.



Hayley Robinson,
Private Banker

Our Services

Current Accounts

- Current account with cheque book
- Direct Debits, Standing Orders, Money Transmission (CHAPS/BACS)
- Visa Debit Card
- Online banking — money management with up-to-date balance and transaction information
- Full narrative statements — showing essential transaction information

Foreign exchange

- A comprehensive FX service for all currency transactions
- We can also operate onshore currency accounts in most currencies

Deposits

We have assembled a range of straightforward cash deposit arrangements offering competitive interest rates:

- Private Reserve: Providing instant access to funds which can be linked by a daily sweep to your current account
- Notice Accounts: Offering a higher rate of interest to clients who are able to give notice of withdrawal
- Fixed Term Deposit Accounts: For amounts in excess of £50,000, our fixed term deposit accounts let your money work harder for you

Lending

As an independent family-owned business, our lending facilities are tailored to individual needs and include:

- Mortgages and loans
- Bridging finance
- Working capital facilities

Important information:

Investments can go up and down in value and you may not get back the full amount originally invested.

Your home may be repossessed if you do not keep up repayments on a mortgage or any debt secured against it. All mortgages and loans are subject to underwriting and criteria.

You must be 18 years or over to apply.

Investment and Wealth Advice

Weatherbys offers a full financial planning and tax advice service. Our key areas of expertise includes:

Investment advice: We advocate straightforward, low-cost investments to fulfil your objectives. Our only incentive is to recommend what is right for you. Our in-house portfolios are efficiently constructed from index-tracking funds and are available with no additional management charge. They are a robust, evidence-based gateway to global stocks and bonds, all supported by our own rigorous research.

We also offer our clients access to carefully selected bespoke portfolio managers on advantageous terms. These managers can tailor their services, should you desire more precise positioning or enhanced engagement for sustainability.

Either way, your personalised advice is reviewed and endorsed by our fully qualified investment experts.

Retirement planning and income: Our team will work with you to build a financial plan to achieve your retirement income objectives in the most tax-efficient way possible. Our approach is underpinned by rigorous cash flow modelling with the aim of providing financial peace of mind for life.

Estate planning: Focus on your legacy and the impact on those you leave behind. Our expertise provides a framework delivering both control and flexibility in the most tax-efficient manner possible for generations to come.

Protection: No matter what the future holds, our commitment is to provide advice-led solutions to protect you, your business, and your family. We want to give you the assurance you have the right levels of protection in place.



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We believe in treating clients as individuals and as part of our extended family.

Duncan Gourlay,
Deputy Head of Private Clients

Contact

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If you are interested
in finding out more about
how Weatherbys Private
Bank can help, **please get
in touch or speak to your
private banking team.**



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Weatherbys Private Bank is a trading name of Weatherbys Bank Ltd and is authorised and regulated by the Prudential Regulation Authority, and regulated by the Financial Conduct Authority. Financial Services Register number: 204571. Weatherbys Bank Ltd is registered at Sanders Road Wellingborough Northamptonshire NN8 4BX. Registered number: 2943300.