Jill Woodford

financial solutions

Connoisseur for fine insurances and sound investments

Financial Planning

Depending on where a client is in their life cycle (starting a family, planning retirement, retired), there will be different needs and differing solutions. Central tools to financial planning are a global analysis, relevant tax calculations, a risk profile and a risk analysis based on the insights of psychology of money. A strategy is formulated, key areas of risk exposure are identified and diversification of asset classes may be recommended.

Transparency

I am fully independent. When I work together with a client I inform them about the business partners I have, so that they have complete transparency. I work in a fair, cost-efficient and solution-oriented manner. Any potential costs for the client are clearly set out in a separate agreement.

My Qualifications

- I am licensed as an independent insurance broker with the FINMA under the Register Number 16081
- I am a Certified Fund Advisor IAF