



# Later Life Planning



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Our later life planning service focuses on the needs of those managing personal finances at this potentially complex stage. Often those utilising this service are acting as an attorney for a friend or relative. We can help you:

- Achieve clarity and order over personal finances
- Release equity from property
- Re-structure finances to meet care costs
- Navigate complexity and jargon
- Meet duties and responsibilities

## Service fees

We charge a fixed fee for delivering valuable advice, not for selling products.

If product recommendations are made as part of your financial plan, we do not receive any additional remuneration and there is no additional charge to you.

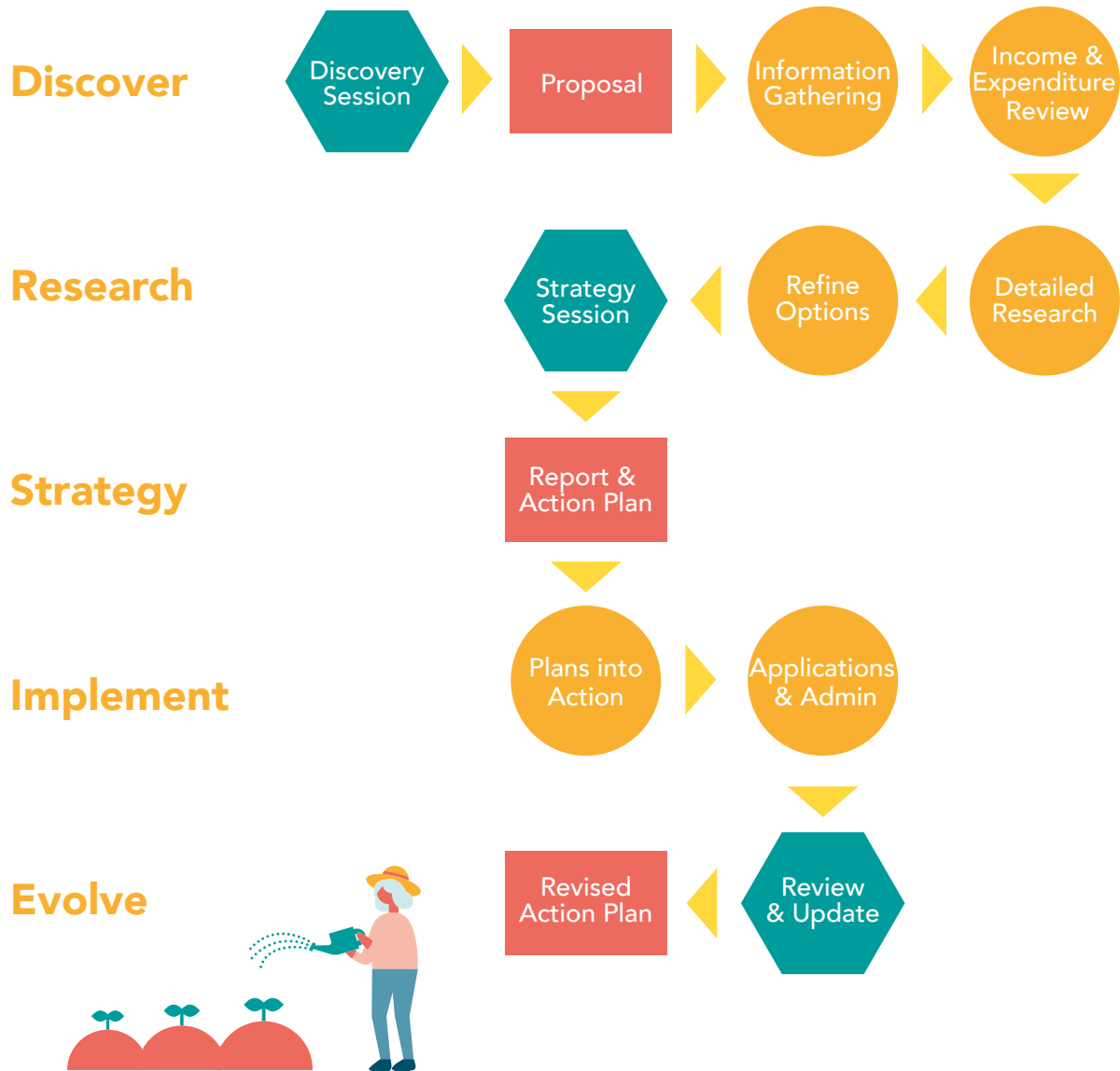
The cost of advice will vary depending upon the exact nature of your personal requirements. A typical review will cost between £2,695 and £3,995, but your adviser will provide you with a detailed proposal document following your discovery session.

*“Very impressed with speed, simplicity, lack of hassle in the process.”*

Maron, 56



# The Later Life Planning Service...



*“Personable, extremely knowledgeable and completely in tune with our family’s needs.*

*I felt in such ‘safe’ hands throughout the process and any stress I felt initially evaporated due to your consistency, approachability, attention to detail and diligence from day one. Thank you so much.”*

Ted, 84

**Contact us today**  
to arrange your complimentary  
discovery session

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