FIND PEACE OF MIND

Personal Finance
for the Life you Desire

"A professional yet friendly service,
helping us to achieve our dreams. Excellent!"

FPoM - Welcome Pack

A fresh approach to financial planning and mortgage advice.
We work with you to design and deliver the lifestyle you desire.

What we Do

At Find Peace of Mind we work with individuals, couples and families to design and deliver desired lifestyles. As experienced financial planners, we have the technical expertise and insights you would expect, but more than that we help you to think differently. We connect your personal finances with what you truly value.

Why we Do It

Find Peace of Mind was founded in 2005 by Emily Macpherson, a dissatisfied client of the financial services industry. Left feeling confused and 'sold to', Emily chose to re-train as a financial planner, determined to cut through jargon and complexity to deliver a service that has a positive and meaningful impact on people's lives.

We Believe That....

- Done right, financial planning can be an enlightening and empowering process.
- It is not about making the most money, it's about thinking beyond money and structuring your finances to live the life you desire.
- Financial planning is about outcomes, not products.
- We can make the world a happier place.

Our Services

We are directly authorised by the Financial Conduct Authority (FCA) our FCA number is 510117. We provide independent advice, and place no restrictions on the solutions that form part of our personal recommendations to you.

Examples of our most popular services are included here, but we can tailor our service to meet your individual needs.

Retirement Planning - Your Financial Freedom Plan

Supporting individuals and couples looking to achieve financial freedom within the next ten years to achieve clarity and peace of mind. We help you to:

- Make sense of existing pensions and other assets and how they can be structured to meet your needs over time.
- Identify how much is 'enough' and when you will achieve it.
- Navigate complexity and jargon.
- Dispel fears over making the wrong choices.

Later Life Planning

Focused on the needs of those managing personal finances during retirement, for themselves or acting as an attorney for a friend or loved one. We can help you to:

- Achieve clarity and order over personal finances.
- Understand and mitigate Inheritance Tax Liability
- Release equity from property.
- Re-structure finances to meet care costs.
- Navigate complexity and jargon.

Independent Mortgage Advice

Buying or re-financing property is about more than just finding the best mortgage deal.

We support you by:

- Assessing your options and optimising your overall strategy.
- Assessing and minimising costs.
- Identifying and avoiding pitfalls
- Submitting applications and managing the process on your behalf.
- Acting as a trusted adviser throughout.

The Find Peace of Mind Journey

1 Discovery Session

Delivered by a fully-qualified adviser without charge or commitment, your Discovery Session enables you to:

- Share your requirements and goals
- Discuss any questions or concerns
- Learn more about how we can help

2 Requirement Summary

We will provide a Requirement Summary document which will:

- Provide an overview of your position
- Define the purpose and structure of the work to be undertaken
- Clarify the desired outcomes
- Confirm our fee

3 Research & Analysis

We build a clear picture of your financial position, now and in the future, using cash flow modelling tools where appropriate, so that we can assess your options and consider opportunities.

4 Strategy Session

We discuss and refine your options together, shaping a strategy around your individual circumstances and goals, until we agree the right plan for you.

5 Report & Action Plan

Your agreed strategy will be written up clearly so you know exactly what happens next. We will provide independent advice and a personal recommendation for any financial products required.

6 Implementation

We put your plan into action, submitting applications and managing the process on your behalf to make things as stress-free as possible. From here, ongoing advice is available to ensure your plan remains on track over the long-term.

Ongoing Advice

Our objective is to be your trusted adviser for life (and beyond!). Our ongoing service is delivered by a small team of real people, who take the time to get to know you, your motivations, and ambitions so that we can ensure your personal finances are optimally structured to support you in living the life you desire. A detailed guide to our ongoing service can be accessed by clicking here.

"Thank you for all your help and hard work, I don't know what we would do without you"

"Would have lost everything that mattered without your help"

"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."

"Exceptionally friendly, efficient service"

Privacy Policy

In order to deliver our services we will need to gather and store detailed information about your personal and financial circumstances, preferences and objectives. We take your privacy very seriously and are committed to protecting it. We hold your personal information securely and will only ever pass it on, with your consent, for the purpose of completing tasks and providing services you have requested of us. We will never sell your data. View our full Privacy Policy here.

"Always very helpful and informed. Have recommended to friends and family and will always use myself "

Fees

We believe financial planning should be about outcomes, not products — and that starts with being upfront about cost. Our fees and charges guide can be accessed by clicking here.

We begin with a no-obligation Discovery Session, following which the fixed fee for our advice will be confirmed in writing — before you commit to anything.

Contact Us

- Telephone: 01749 676625
- E-mail: info@findpeaceofmind.co.uk
- Web: www.findpeaceofmind.co.uk
- Post: Glenmoor, Pitney, Langport, TA10 9AU (registered address)

Financial Services Compensation Scheme (FSCS)

We are covered by the FSCS. You may be entitled to compensation from the scheme if we cannot meet our obligations. The amount of compensation available depends on the type of business and the circumstances of the claim. Further information about compensation arrangements is available from the FSCS at www.fscs.org.uk.