



Retirement Planning

FIND
PEACE
OF
MIND

Personal Finance
for the Life you Desire

Retirement Planning

Managing our personal finances is a necessary part of planning for retirement. Our proven process breaks through complexity and jargon to give you clarity and peace of mind. We help you:

- Identify when you can retire
- Work out if you have 'enough'
- Navigate complexity and jargon
- Dispel fears over making the wrong choices

The RETIRE Method and Guiding Principles

| | |
|-----------|---|
| Reconnect | Reconnect you with your highest values |
| Evaluate | Develop a clear picture of where you stand financially. |
| Translate | Translate financial facts to meaningful outcomes |
| Implement | Put plans in to action |
| Realise | Live the life you desire |
| Evolve | Ensure things remain on track over time |

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 your bespoke RETIRE programme will vary depending upon the exact nature of your requirements.

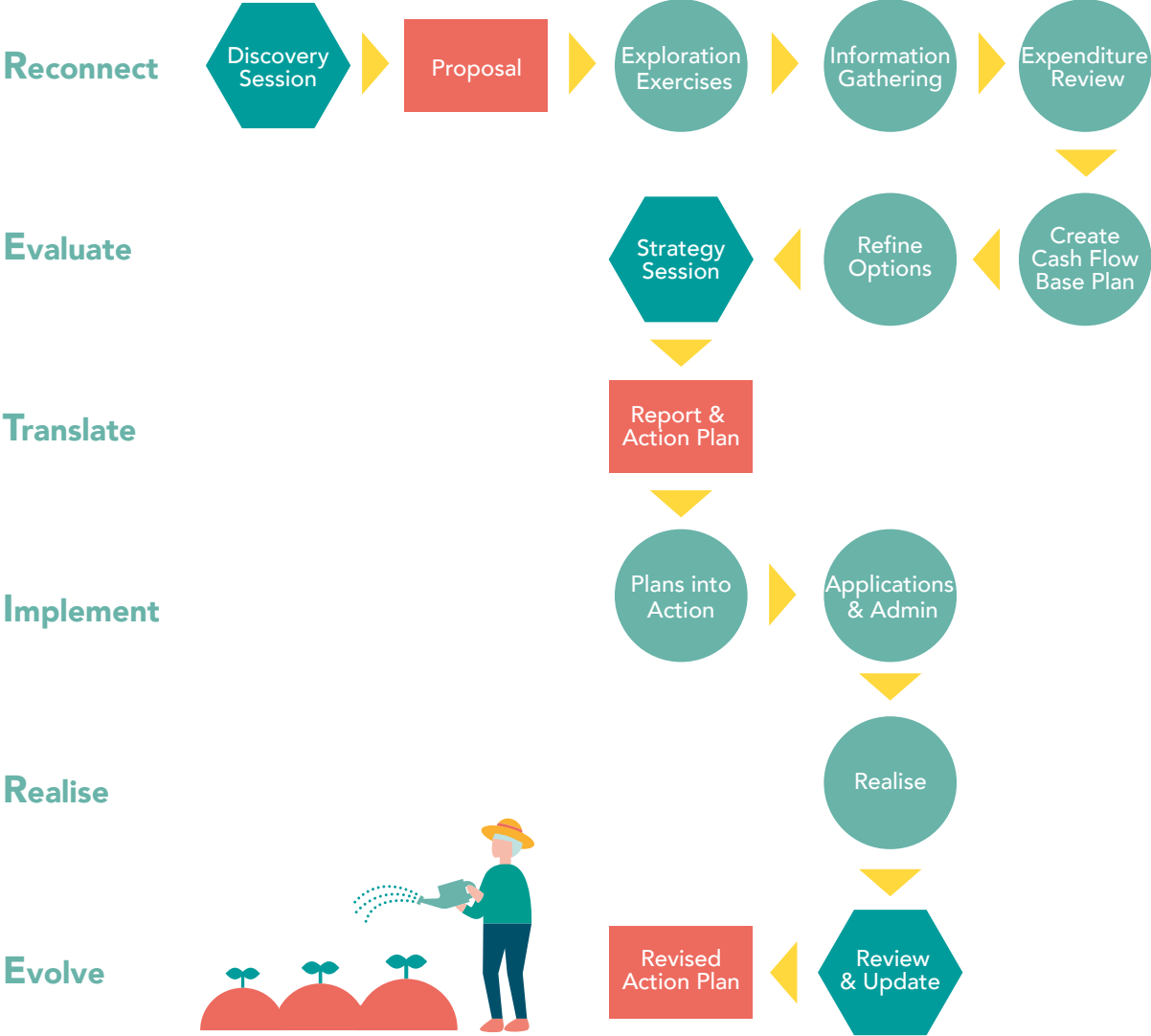
A typical review will cost between £2,695 and £3,995, but your adviser will provide you with a detailed proposal document following your discovery session.

*"I really do
have peace
of mind!"*

Mary, 55



The RETIRE Planning Service ...



“Professional set-up that helps make something potentially confusing very clear. Every question answered and thorough follow up work.”

Thomas, 48

Contact us today
to arrange your complimentary
discovery session

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