FIND PEACE OF MIND

Personal Finance
for the Life you Desire

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

A Fresh Approach to Financial Planning

We work with you to design and deliver the lifestyle you desire.

Our Values

Relationships

We value relationships as well as results.

Responsibility for the Bigger Picture

We take responsibility for the bigger picture, managing the process as a whole.

Inspiring Belief

We believe that we can all achieve great things and we support our clients to fulfill their potential.

Positive Impact

We strive to positively impact as many lives as possible through our work and philanthropic endeavours.

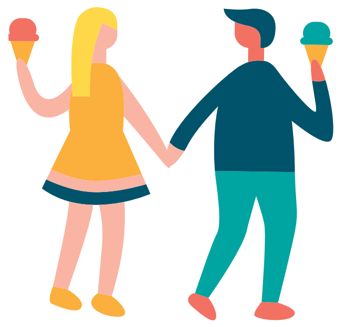
What we Do

We work with individuals, couples and families to design and deliver desired lifestyles. As experienced financial planners, we have the expertise to ensure the technical excellence you would expect, but more than that we help you to think differently. We transform your relationship with your finances by connecting them 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.

The Mindful Money Tree™

What are your personal values and how are your personal finances supporting you to live by them?

This question is more difficult to answer than you might imagine and that's why we have developed The Mindful Money Tree™, a different approach to thinking about your personal finances.

Drawing on over 50 years' collective experience working with people from different backgrounds with different needs and requirements, The Mindful Money Tree™ represents an individual's relationship with their personal finances.

The tree's trunk is your core identity – that intangible inner essence that makes you, you. Your identity is nurtured and strengthened by the living the life you desire.

The six 'branches of being' reflect the different aspects of life; how you experience the world and the values you live by. Upon these branches grows the fruit. The fruit is the ultimate goal, a fulfilling life in whatever form that takes for you.

The roots of your Mindful Money Tree absorb sustenance in the form of money and other assets. It will thrive and produce fruit in an environment of good financial planning, but the key thing to note is that the money is not the fruit.

You will require some money to grow the fruit, but a fulfilling life is the hoped for harvest, not wealth or money in its own right.

Explore your relationship with money and begin to harness your personal finances to support you in living the life you desire.

Take your Mindful Money Tree Self Assessment at www.findpeaceofmind.co.uk.

We have developed four unique services that support you in aligning your personal finances to your personal values...

Financial Review Service

For those looking for a clear plan to guide them through the 'adulthood' and 'maturity' stages of their financial journey.

This programme supports you to clarify your goals and structure your personal finances to achieve your desired lifestyle over the long term.

Read our Financial Review booklet for more details

Property Finance Service

For those looking to buy or re-finance their property.

We help you look at the 'bigger picture' with a strategy that supports your long-term ambitions. We act as project managers for your property transactions, so you get the most cost-effective solution with the least amount of hassle.

Read our Property Finance booklet for more details

Retirement Planning Service

Supporting individuals and couples looking to retire within the next ten years, to discover a fresh perspective.

We work to align your personal finances with your highest values and deliver the retirement you desire.

The RETIRE Process features in the ground-breaking book, *Retirement Compass - Personal Finance for the Life you Desire.*

Read our Retirement Planning booklet for more details

Later Life Planning Service

During the 'decumulation' stage of the financial journey and beyond, financial requirements can change.

Our Later Life planning service focuses on the needs of those managing their personal finances at this potentially complex stage.

Often those using this service are acting as an attorney for a friend or relative in their later years.

Read our Later Life Planning booklet for more details

The Discovery Session

Our discovery sessions, delivered by experienced advisers, are conducted at our expense and without obligation.

Typically the session will last around 60-90 minutes and will enable you to:

Share your requirements, goals and objectives

Discuss any questions or concerns you might have

Discover tools and frameworks that can help you uncover true meaning for your money

Discuss our services in more detail

Your Data and How we Use it

So that we can deliver a truly personal service, it is essential that we gather and process your personal information. Please view our data processing policy we will ask you to confirm your acceptance of our terms of business before we can deliver a discovery session.

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www.findpeaceofmind.co.uk

Financial Products

All of our services include full implementation. We will provide you with independent advice and a personal recommendation in respect of any financial products that are required as part of your plan.

We are qualified to advise on the full range of solutions including investments, pensions, mortgages, equity release, and insurance, and place no restrictionson the solutions we will consider in our recommendations.

Our charges are designed to be fair and transparent, they reflect the fact that our service is advice-focused rather than sales-driven and these are explained in detail in our service booklets.

The Financial Conduct Authority (FCA) is the independent watchdog that regulates financial services and we are directly authorised by them. Our FCA number is 510117 and you can find us at www.fca.org.uk/register.

Feedback

We aspire to deliver an exceptional service but we need your help to tell us what we are doing right - or wrong - in order for us to grow. We will ask for your feedback at various points throughout the process and would really appreciate you taking the time to provide it.

"Exceptionally friendly, efficient service."

"Very helpful, easy to contact, good advice."

"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."

"All-round efficient, friendly, simple, effective service."

"Outstanding service."

"Would have lost everything that mattered without your help."