LONGHURST

YOUR JOURNEY TO FINANCIAL INDEPENDENCE

EMPLOYEE FINANCIAL REVIEW SERVICE

Longhurst has developed the above service for all employees no matter what life stage they are at. For example those who are at the beginning of their careers and looking to build their wealth, those who may be looking for mortgages and planning for changes in status, those seeking simple solutions to preserve wealth built up over their lifetime, or those who are approaching retirement.

What's included in the service?

- Employee focussed 1-2-1 meeting with an FCA regulated financial planner
- Each meeting is held at your place of work and typically lasts 20-30 minutes
- Everything that is discussed with the financial planner is in the strictest of confidence
- There is no cost to the employee for this meeting

Each meeting provides the employee an opportunity to ask questions about any area of financial advice need, for example:

- Pension & retirement planning
- At-retirement options & decisions
- Tax efficient savings and investments
- Wealth management & estate planning
- Mortgage & re-financing advice
- Family protection insurances, critical illness, income protection options
- Wills, trusts, lasting powers of attorney*
- Review of existing arrangements*

Costs may be incurred if an employee subsequently chooses to engage in future advice services, all of which will be explained to them during the meeting ahead of any commitment being made.

*These services are not regulated by the Financial Conduct Authority

LONGHURST

YOUR JOURNEY TO FINANCIAL INDEPENDENCE

Chris Broome FPFS
Chartered Financial Planner

01327 223243 / 07793 841654

chris@longhurst.co.uk

www.longhurst.co.uk