

## **Would you benefit from a financial review?**

Listed below are some of the most common questions that people like you have about their finances. If you would like some help with any of these areas, please tick as many boxes as you like on the right-hand side and I will arrange for our recommended financial adviser to make contact.

There is no cost for an initial - no obligation - conversation.

<b>Most common questions from working age people:</b>	<b>Please tick if you would like some help in this area</b>
1. Am I on the best mortgage deal?	
2. Can I afford to move to a new house?	
3. How can I pay off my mortgage faster?	
4. Would my family be ok if something happened to me?	
5. Do I need life insurance, and if so, how much?	
6. Would I be able to pay the bills if I was not well enough to work?	
7. Where is the best place to start with saving or investing money?	
8. How much risk should I take with my pension, savings, or investments?	
9. How can I learn more about tax efficient savings and investments like ISAs?	
10. How do I set up a pension and how much should I save?	
11. Which pension company is best for me and how do I choose?	
12. What planning should I do for significant life events?	
13. How should I go about saving some money for my children?	
14. Where can I find out more about different types of pensions and whether I should have one?	
15. When can I realistically retire and how much I will need to save?	
16. What is the best type of pension for me?	
17. Is my company pension scheme any good and will it be enough?	
18. I have inherited some money and would like to know what to do with it.	
19. Do I need to have a will?	
20. I am interested in finding out how to pay less tax	
21. How do I build a financial plan that meets my needs?	
22. How do I pay less in tax?	
23. I would like my pensions and investments to meet modern ethical standards, how do I know if they are?	