FREE MONEY Q&A POP-UP

Money questions?
Ask us.

Mortgage, protection and financial advisers - here for the day.

WEDNESDAY 19 AUGUST **9AM-5PM** KITE ROOM

Pop in with the question that has been sitting on your list

Whether it is about your next home, protecting your family, making more of your money or planning around your business, come and have an informal conversation with one of us.

MORTGAGES & PROPERTY

Buying, moving, remortgaging, buy-to-let and investment properties

PROTECTION

Life cover, critical illness, income protection and business cover

PERSONAL & BUSINESS PLANNING

Cashflow, pensions, investments, estates, surplus cash, business assets and exit planning

Meet the advisers

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Residential, buy-to-let & protection

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Individuals, families & business owners

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Just pop in - or reserve a time in advance

FREE TO ATTEND · NO APPOINTMENT NEEDED · NO OBLIGATION

Contact any of us beforehand if you would prefer a specific time

The Bradfield Centre · 184 Cambridge Science Park · Milton Road · Cambridge · CB4 0GA

Initial conversations are informal and without obligation. Any advice or recommendation would only be provided after learning more about your circumstances and issuing the relevant disclosures. Your home may be repossessed if you do not keep up repayments on your mortgage. The value of investments can fall as well as rise and you may get back less than you invested.

WHAT COULD YOU ASK US?

One question.
A clearer next step.

A quick conversation could help you work out what to do next.

MORTGAGES & PROPERTY

- Is your current mortgage deal coming to an end?
- Could you borrow more - or reduce what you pay?
- Are you buying, moving or investing in property?
- Would being self-employed affect your mortgage options?
- Could a buy-to-let or investment property work for you?

PROTECTING WHAT MATTERS

- Would your income continue if illness stopped you working?
- Would your family be financially secure if life changed?
- Is your existing cover still suitable and competitive?
- Could your business cope without a key person or director?
- Do shareholders, borrowing or employees need protection?

YOUR MONEY, LIFE & FUTURE

- Are all your assets working together towards what matters to you?
- Are you making full use of available tax allowances?
- Should spare cash repay your mortgage, be invested or remain accessible?
- What can you afford now, in retirement or after a major life decision?
- Would your estate reach the right people as tax-efficiently as possible?

YOU & YOUR BUSINESS

- Could surplus company cash be working harder?
- How could your business and its assets support your retirement?
- Should profits be retained, invested or used within your personal planning?
- What would selling, stepping back or succession mean for your financial independence?
- Are your business and personal assets working towards the same plan?

Recognise one? Bring it with you.

FREE TO ATTEND · NO APPOINTMENT NEEDED · OR CONTACT US TO RESERVE A TIME

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