SUMMARY OF SERVICES

60 Iberian Way, Camberley, Surrey, GU15 1LY
Tel 01276 517700

It is important that our clients are aware of the many services provided by Professional Wealthcare. The following is a comprehensive list of our main services. Please contact us if you require our help in any of these areas.

Mortgage Protection

Advice on protecting your mortgage in the event of death, illness, disability or redundancy.

Life Assurance

Advice on providing for your family, business, school fees commitments or paying off your mortgage in the event of death.

Financial Provision in the event of Serious Illness

Advice on providing for you and/or your family, or your business in the event of suffering a serious illness.

Income Protection

Advice on replacing your income in the event of illness or incapacity.

Private Medical Insurance

Advice on providing medical care for yourself, your family or your staff by the private healthcare sector.

Lump Sum Investment

Advice on investing capital for growth or income.

Regular Savings

Advice on saving a regular sum each month. This could be for yourself, or to provide for your child's or your grandchild's future.

School Fees Planning

Advice on making financial provision for school fees.

Retirement Planning

Advice on setting up a pension scheme, whether privately or through your business. This includes advice on 'Stakeholder' pensions.

Retirement Options

Advice if you are approaching or have reached retirement age and would like understand the available options for your accumulated pension fund.

Business Protection

Advice on protecting your business in the event of the death or serious illness of yourself, a key employee, shareholder, director or partner.

Business Investment

Advice on tax efficient ways to invest capital for your business.

Group Protection Schemes

Advice on providing group death in service benefits as part of your employees' benefits package.

Group Pension Schemes

Advice on setting up a pension scheme for your employees. This includes advice on 'Stakeholder' pensions.

Income and Capital Gains Tax Reduction

Advice on tax planning, reducing or deferring taxation.

Estate Planning and Inheritance Tax Reduction

Advice on providing for or reducing Inheritance tax and preserving your estate for your beneficiaries after your death.

Financial Plans Review Service

It is important that your pension, investment and protection plans are reviewed from time to time. We can provide advice on the suitability and cost of your existing arrangements.

Pensions Review Service

This is a specialist service which provides:

- A full analysis of your pension plans.
- A report and discussion detailing plan charges, investment performance, plan flexibility and more.
- Recommendations for possible improvements that could be made.
- Recommendations for investment strategy.
- Recommendations for required contribution levels to meet objectives.
- Your portfolio will be regularly monitored and you will receive regular updates.

For online services, please visit:

Website: **www.professional-wealthcare.co.uk**

Blog: www.professional-wealthcare.co.uk/blog

Email: advice@professional-wealthcare.co.uk

PROFESSIONAL WEALTHCARE