

# Ensuring your plans remain on track

A guide to our ongoing Financial Monitoring Service

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**Ongoing peace of mind**

Experience shows that financial planning yields the largest rewards when carried out as an ongoing process, rather than simply a one-off event. From avoiding the common mistakes that negatively impact investor returns, to identifying new planning opportunities, our clients tell us they value the reassurance that comes with knowing their investment and pension plans are being professionally monitored and reviewed.

Our Financial Monitoring Service aims to give you the confidence that comes with knowing your plans remain on track, with regular reporting, ongoing suitability assessments and access to an experienced Financial Planner when needed.

## The ongoing Financial Monitoring Service incorporates the following core services:

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⇒ Access to an experienced and highly qualified Financial Planner – your single point of contact for all financial planning matters.

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⇒ Your financial questions answered by your Financial Planner, backed by an experienced support team.

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⇒ The opportunity to meet with your Financial Planner at key junctures to discuss your evolving circumstances and financial goals.

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⇒ We maintain direct contact with your plan providers and keep accurate records of your plans – easing the administrative burden.

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⇒ A company-wide commitment to a programme of ongoing professional development means that the advice you receive will always be current, relevant and holistic.

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⇒ Unbiased, independent advice.

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When managing your investments, we will typically provide the following services:

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- ⇒ An Annual Investment Review Report – keeping you up to date with performance.
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- ⇒ Periodic personalised risk assessments.
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- ⇒ Assessments of ongoing suitability of your investment plans with recommendations for improvement where identified.
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- ⇒ Utilisation of your annual ISA allowance – maximising the tax efficiency of your portfolio.
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- ⇒ Advice on, and facilitation of, withdrawals.
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- ⇒ Ongoing market monitoring and investment provider research and due diligence.
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- ⇒ Interpretation of pension and investment paperwork and statements – helping you fully understand your plans.
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**Access to additional support**

In addition to the ongoing services highlighted in this booklet, the team at Plan Money can advise on the following areas of financial planning:

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⇒ Reaching retirement – helping you make wise decisions. \*

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⇒ Drawing a sustainable, tax efficient income. \*

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⇒ Pension tax planning. \*

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⇒ Inheritance Tax planning. \*

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⇒ Arranging new investments / pensions. \*

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⇒ Personal and family protection insurance.

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⇒ Mortgages, buy-to-let and equity release. \*

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⇒ Care fees and later life planning. \*

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\*Additional fees apply

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