

## Get a FREE personal financial health check

To most of us, organising our finances is a daunting challenge. Yet, despite the serious consequences for our future well-being, it's surprising how little time we devote to improving our financial health. The sheer number and complexity of financial products available often hinders rather than helps us to make a truly informed decision.

To help assist our clients with financial planning guidance, Smithson Law Firm LLP has established a relationship with AWD Chase de Vere Wealth Management Limited, one of the UK's leading independent financial advice firms.

Whether you're moving home or planning for retirement, AWD Chase de Vere can provide you with unbiased and comprehensive advice, helping you to make decisions, plan ahead, and get the most out of life.

Historically, AWD Chase de Vere's roots in the UK span over three decades and they have demonstrated, as one of the few totally independent financial advisers that they are well placed to deal with financial planning effectively and have an enviable breadth of experience in providing solutions.

### **Expert advice where it matters most – a brand new service to improve your financial position**

To mark the start of our relationship with AWD Chase de Vere, we are offering all our clients the opportunity to have an initial meeting with one of their financial advisers. There will be no charge or obligation associated with this meeting. If a need for advice is identified, the costs associated with the advice service will be fully disclosed and discussed with you before any work is undertaken.

Your meeting can take place at a time and location convenient to you, and we believe would be a real benefit to you if you have any concerns in the following areas:

- Pensions
- Retirement Planning
- Savings and Investments
- Life & Income Protection
- Inheritance Tax
- Mortgages

If you would like to take advantage of our offer for a free review, please call Angela Milton on 0191 241 4557 (email: [alm@smithsonlawfirm.com](mailto:alm@smithsonlawfirm.com)) or complete and return the enclosed request.

Yours sincerely,

*Michael Smithson*

Senior Partner, Smithson Law Firm LLP

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## Personal Financial Health Check – Meeting Request

*Please return this form to Smithson Law Firm LLP, Ward's Buildings, 31-39 High Bridge, Newcastle upon Tyne NE1 1EW, or fax it to us on 0845 301 1157.*

Title \_\_\_\_\_

First name \_\_\_\_\_

Surname \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_

Email \_\_\_\_\_

To help you and your financial adviser get the most from your initial meeting, could we ask whether there has been, or is there likely to be in the next 12 months, any changes in your circumstances involving (tick where applicable):

- Change of occupation or employment status
- Joining or leaving an employers' pension
- Loss of employee benefits
- Maturing insurance policies, TESSAs, etc
- Investment portfolio review
- Review of your will
- Property purchase
- Increase to your family (children or grandchildren)
- Inheritance tax planning
- Use of your ISA allowance
- Starting up your own business
- Making large monetary gifts
- Long term care provision (yourself or elderly relative)