

Financial planning

Making your money work for you

Financial planning is a long-term activity that aligns your personal goals to your financial situation. It's about making your money work hard for you – helping you make good decisions that ensure a life well-lived, not just money well-preserved: after all you can't take your money with you.

A good financial planner will help you to establish what those goals are and work with you to find a way to get you there. Here are a few thoughts for starters...



Points to consider

1

What will happen if?

You can't predict the future, but good financial planning can offer some peace-of-mind that everything will be OK if you're made redundant, you become ill or get divorced.

2

Will I have enough for life?

Not just for life but the life you choose to live. Cash flow modelling, protection and investment planning can help you work out how much is enough and to make your money work best for you.

3

Are my investments fit for purpose?

Over time your situation will change. We can look at your existing investment portfolio and offer a no obligation analysis of how suited it is to your current circumstances.

4

What can I pass to my children?

Effective estate planning can help you navigate complex tax laws and make the right financial decisions for your family, both now and for the future.

5

Can I afford to give?

Increasingly, giving money away is an important priority and goal. We can help identify the best way to do this.

Brought to you by Wollens Financial Planning

We have offices in Barnstaple, Dartmouth, Exeter, Newton Abbot and Torquay.
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