



Professional Independent Financial Advisers



PEOPLE YOU CAN TRUST

Introduction

Whether your inquiry is on a personal or corporate basis, the major financial decisions that you make will have significant and life-changing consequences. It is therefore, essential that you seek professional independent financial advice from people you can trust.

FULLY REGULATED

We are regulated by the Financial Conduct Authority (FCA) and we work within a regulated environment which prioritises the interests of consumers.

We have responded to the FCA initiative, Treating Customers Fairly and has set out what clients can expect as part of our advice process.



About us

We are a firm of Independent Financial Advisers specialising in the management of investment portfolios, pensions and estate planning.

We have been helping clients navigate complex financial markets since 2007 and from those very early days, our business has evolved primarily through client recommendation.

Our qualified advisers cover the whole financial services market and provide a tailor made solution specific to your needs and objectives.



Highest quality impartial advice

At EFS our highly skilled advisers use state of the art technology enabling us to meet all of our clients' financial needs and achieve their objectives in the most cost effective way.

This is important because there are literally thousands of different options available and our clients want to be certain that any investment, pension, mortgage, healthcare or insurance recommendations that we present for consideration are the most appropriate to their individual needs.

Our approach

We believe firmly in the importance of working together to build rewarding relationships and working closely with our clients enables us to help them fulfill and achieve their objectives.

The relationship that we build with our clients is underpinned by our commitment to ensure that their long term financial goals are achieved.

We believe it is important to have a disciplined approach towards developing a successful financial planning strategy and follow this process:



1. REVIEW MEETING

We undertake a comprehensive financial review of your circumstances and financial objectives taking account of any existing arrangements.



2. GOAL SETTING

We will analyse your needs and goals in great depth to ensure that your financial lifestyle and, if applicable, business plan is designed to meet these objectives.



3. ANALYSIS & RESEARCH

We will undertake thorough independent analysis and research to tailor individual solutions to your needs and goals.



4. FINANCIAL PLAN

We will present you with a comprehensive financial report to be discussed and refined as required.



5. IMPLEMENTATION

We will discuss the appropriate ongoing plan to ensure the successful delivery of your goals.



6. REGULAR REVIEWS

We will diarise reviews in advance to ensure the financial plan we have put in place is refined and keeps pace with any change in circumstances.



How we are paid

At the initial review meeting we will discuss your needs and how we will be paid for the products we are recommending. We do not charge for this initial meeting and there is no obligation on either side.

Adviser Charges are paid to an Independent Financial Adviser (IFA) firm by a Product Provider, usually an insurance company, for the successful placing of business. This remuneration is included within the provider's normal product charges.

Fees may be subject to VAT and we will advise you whether or not this is the case. Under current legislation Adviser Charges do not attract VAT.

Whether we take our remuneration by way of Adviser Charges or fees, will be a matter of discussion between us followed up with a written agreement, no charges for fees will be made without prior notification.

Mortgage solutions

Mortgages are possibly the largest single transaction in most people's lives. Buying a property can be a stressful and time consuming experience.

At Eastwood Financial Solutions we are committed to finding you the right mortgage that suits your individual requirements and circumstances. We will also guide and assist you through each step of the home buying process.

Your home may be repossessed if you do not keep up repayments on your mortgage.



Legal solutions

WILLS

The making of a Will is something that most of us would rather put off to another day.

We all know the importance of putting our financial affairs in order to ensure our family and others for whom we care about, receive the financial means to live their lives with the financial security we would wish to provide for them.

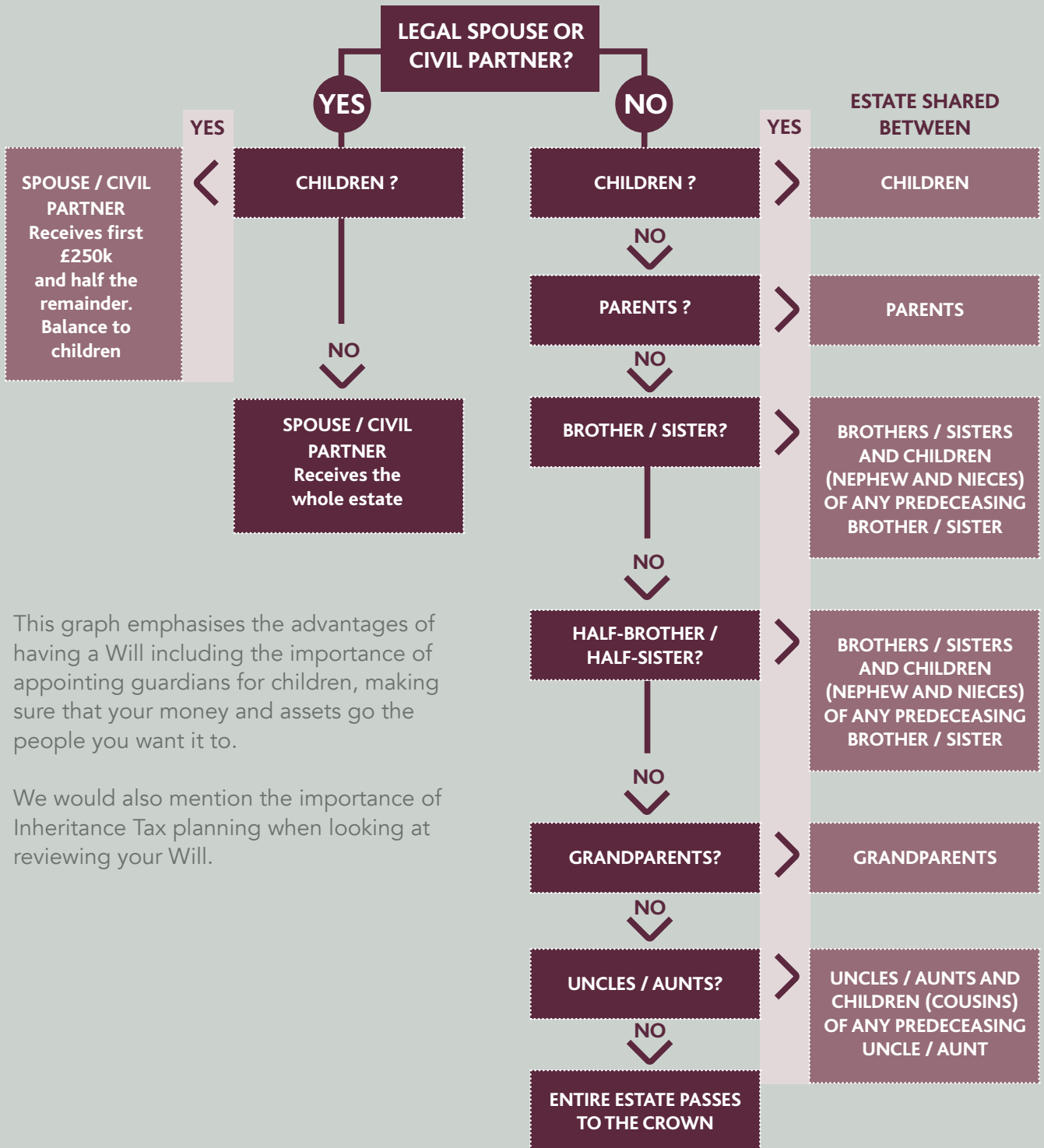
Will writing is not regulated by the Financial Conduct Authority.

LASTING POWERS OF ATTORNEY

We would recommend you consider creating a Lasting Power of Attorney, such that in the event of your mental or physical incapacity or you simply need help to manage your financial affairs, arrangements are in place for your attorneys to provide guidance and help.

RULES OF INTESTACY SIMPLIFIED

Who survived the deceased?



This graph emphasises the advantages of having a Will including the importance of appointing guardians for children, making sure that your money and assets go the people you want it to.

We would also mention the importance of Inheritance Tax planning when looking at reviewing your Will.



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Authorised and regulated by
the Financial Conduct Authority