



UNLOCK YOUR
FINANCIAL FUTURE

Q U A Y

• FINANCIAL PLANNING •



“ Wealth is the ability to fully experience life. ”

Henry David Thoreau

Welcome

Let Quay unlock your financial future

Quay Financial Planning is an independent financial advice firm with offices in Kings Lynn, Norfolk and central London.

Our business is built around our clients and helping them to achieve their important financial goals. We appreciate that after a lifetime of work, you want to have financial security and to live the life that you have imagined. Our job is to help you do that.

At Quay Financial Planning, we understand that talking about money

can be difficult. Where do you go to talk about pensions? How much money do you need for the future? Are you making the most of your money now? Who can you trust to help you make these important decisions? Who can help you understand the complexities of those decisions? This is what we do.

Your financial plans will change throughout your life and we will be with you every step of this exciting journey. We offer an initial meeting at no cost to you; this could enable you to plan the beginning of the rest of your life. ■

We look forward to meeting you. Call now to arrange a complimentary, no-obligation meeting on **01553 970995**



What We Do

Helping you to achieve your financial and life goals



After a lifetime of work, you want to have financial security for the rest of your life and live the life you have imagined. We can help you do that.

We will work with you throughout your life to help you save and build your wealth, achieving your goals and aspirations along the way.

Would you like to save for children's education? Consider retiring early? Or perhaps pass money on to future

generations? This is all possible with a well-structured financial plan.

Whatever your circumstances, we take the time to understand your goals and make your money work hard to achieve them.

You will be working with a team who will treat you with respect and care. We want your money to work as hard for you as if it was our own. We will never lose track of the fact that you are trusting us with your future financial security. ■

Our Services

Helping you achieve what you want from your money



Investment Advice

Whether you have a lump sum, or want to save regular amounts, we will work with you to grow your money for your future objectives. Whatever the purpose, we will ensure we use your tax-efficient allowances to make your money go further.



Retirement Planning

You may plan to phase your retirement, or retire earlier. Affordability will be of most importance. It is vital to know whether your goals are achievable, or how they can be. We will work with you to tailor a plan which will help you achieve your retirement aspirations.



Post Retirement Planning

Achieving growth on your money for the long term is important. We will work with you to maximise your money and assets for your long-term financial security. We want you to enjoy your retirement. You have worked hard for it.



Protection Advice

Ensuring your loved ones are looked after in difficult times is probably one of the most important decisions you can make. Identifying your protection needs is paramount as part of a financial plan. We will help you prioritise your needs and identify your protection requirements.



Inheritance Tax Planning

Passing wealth on to future generations may be important to you, as well as minimising tax on your estate. Planning is key. We will work together to devise a strategic plan to ensure you keep control of the money that you need to and to plan for later life eventualities.



How we work

Our five key stages to effective financial planning



1. Initial Meeting

During the first complimentary meeting, we find out all about you and explain our services. We establish your goals and aspirations, and discuss your current financial position and any plans already in place. This involves taking a detailed look into your current financial situation.



2. Research and Analysis

Once we have obtained all of the information we require, we research, analyse and evaluate your current situation with respect to your needs, goals and objectives. We look at the numbers provided by you and third party providers, to develop your draft financial plan.



3. Follow Up

We put together an overview of your current circumstances and financial position in comparison to the goals and objectives that are important to you. Here, we confirm what your options are, what our services will entail and confirm the costs for our advice. It is at this point you decide whether you want to use our services.



4. Recommendations and Implementation

This is where we put together and present our recommendations. This will be a formal advice document, which we will go through together. At this meeting, we will complete the necessary paperwork. We will carry out the necessary administration to implement the advice and forward all pertinent documentation based on our recommendations.



5. Regular Financial Reviews

We know you will have different priorities for your wealth at different points in your life. Whatever your financial aims, we have the expertise, and will review your personal financial plans regularly to ensure they continue to meet your objectives. We will meet at least once a year, and provide you with quarterly reviews, whereby we will complete a 'financial health check' on your arrangements. ■

You are free to contact us at any time, in relation to any financial matter. We will help wherever we can.



A photograph of a woman and a young girl sitting together, laughing joyfully. They are wrapped in a thick, textured blanket. The woman has her hair in a ponytail and is wearing a striped shirt. The girl is also wearing a striped shirt and jeans. The background is a bright window with a grid pattern.

“ Wealth is the ability to fully experience life. Let Quay Financial Planning help you plan to live the life you have always imagined. ”



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