

Your financial health check

Providing you with peace of mind

Our free financial assessment is a great way to review that you are on track to meet your financial goals over the short, medium and long term.

Led by a financial adviser who is part of the Close Brothers PwC team, they understand PwC benefits, policies and independence requirements.

This 45 minute meeting can be arranged at your office, your home or over the phone and will help identify any key gaps and risks in your current financial plans, as well as any areas where you are likely to benefit from professional advice.

Following your review you will receive a helpful, personalised report, that will show:

Confirmation of your goals and areas for consideration

How to seek more guidance or advice through our My WealthPartner Advice service

This financial guidance session can review all seven areas of financial health below, or focus on any specific area of concern.

Please be aware that the value of investments can go down as well as up and you may get back less than you originally invested. Tax benefits are dependent on your individual circumstances and are subject to change. Your home may be repossessed if you do not keep up repayments on your mortgage.



Financial planning



Debt management



Property and mortgages



Protection



Savings and investments



Retirement planning and pensions



Tax planning

Book your financial health check

To book your meeting please call us on 0800 028 8960 or email PwCsupport@closebrothers.com. To ensure the review is as beneficial as possible we might ask you to bring copies of your current financial arrangements.