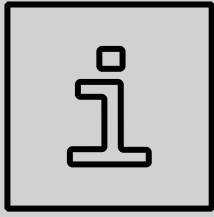

THE BROOKSON GUIDE TO FINANCIAL PLANNING

Helping you shape your future

BROOKSON
FINANCIAL

CONTENTS

Helping you shape your future	3
Getting started	4
How can Brookson Financial help you?	5 - 6
Brookson Financial services at a glance	7
Location and contact details	8



HELPING YOU SHAPE YOUR FUTURE

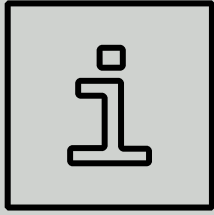
We're delighted that you've chosen Brookson Financial to advise on your business and personal financial affairs, and to help you to maximise your take-home pay.

The Brookson Group has been supporting contractors, freelancers and interim managers for more than two decades, developing a deep understanding of how independent professionals work and what their financial needs are.

Brookson Financial Limited is a wholly owned subsidiary of the Brookson Group and has over 120 years' of combined experience in providing bespoke financial guidance and advice. We offer services tailored specifically for flexible workers. With our help you can put a comprehensive plan in place for a secure financial future.

Our team of financial professionals have the expertise to efficiently and effectively relate your personal goals and objectives to your chosen way of working. You can, therefore, be safe in the knowledge that you are dealing with genuine specialists and will receive practical, straightforward advice to help you mitigate any potential risks and maximise any opportunities.



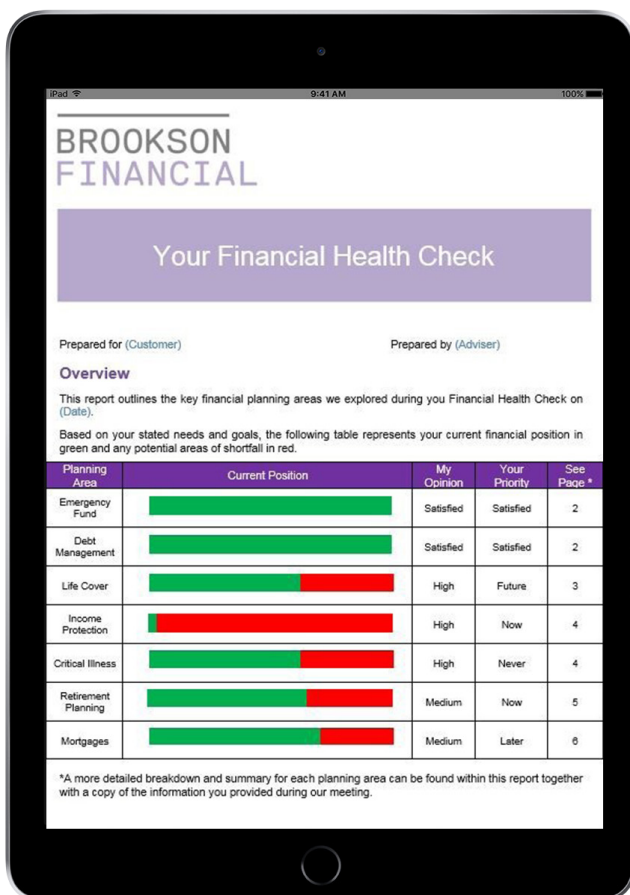


GETTING STARTED

The foundation of sound advice requires a clear picture of your personal and corporate position combined with an understanding of your short, medium and long-term objectives. That's why we start with our free Financial Health Check.

This simple process concludes with a personalised report that clearly explains your current and future financial wellbeing and highlights any areas of need or shortfall.

With your agreement, we can share your report with your tax and legal experts to make sure every angle is covered.



The changing world of work rarely stands still and your financial situation will also fluctuate. That's why we encourage you to have your Health Check report refreshed as your circumstances, goals and objectives change.

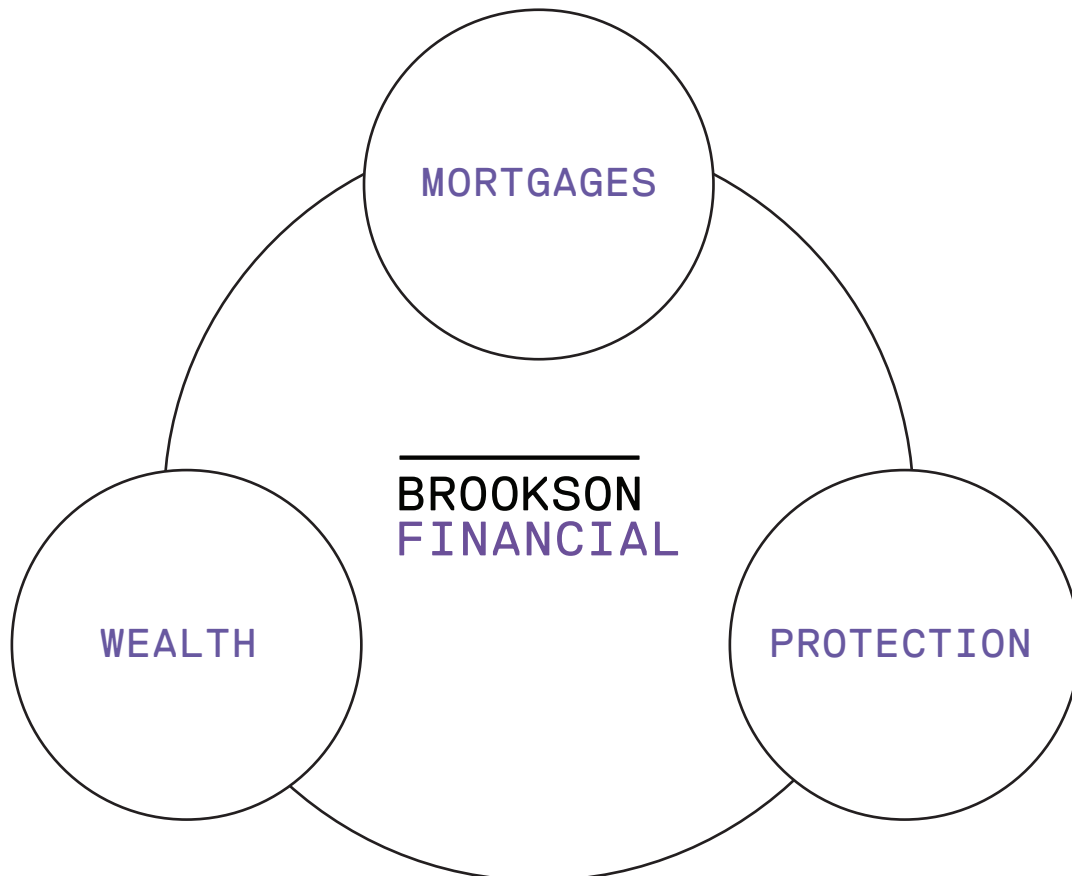
We normally recommend that your first Health Check is completed shortly after a change in circumstances – such as a month or two after you've started your limited company. We can then identify any significant risks associated with your changes and, if required, put solutions in place to reduce or eradicate the risks.

As a general rule, we recommend that you complete a Financial Health Check once a year. This will enable you to monitor progress with your financial affairs and general wealth creation. It also allows us to remain up to date with your ever changing circumstances.



HOW CAN BROOKSON FINANCIAL HELP YOU?

Working with Brookson Financial, you'll have access to some of the most knowledgeable and experienced financial advisers specialising in the flexible workforce.



Protection Services

Being a flexible worker doesn't come with the same type of security as an on payroll employee. There's potentially much less protection when things go wrong.

There's no sick pay, death in service or private medical insurance to fall back on when you're operating alone. If you're ill or injured, the business stops in its tracks – with no employee benefits package to control the damage. If anything happens to you, it puts you and your loved ones at greater financial risk.

We can source business, home, life and income protection policies that meet your needs and priorities and we'll do all the work, complete the application, and ensure a tax-efficient outcome.



HOW CAN BROOKSON FINANCIAL HELP YOU?

Wealth Services

If you earn money outside of conventional payroll, wealth management is often a much more complicated task. Contractors, freelancers and interim managers demand far more flexibility and we can help.

We provide a holistic service dedicated to helping flexible workers achieve long-term wealth and financial security. Our offerings are built around your planning needs, offering adaptability to suit the changing needs of off-payroll working.

Our services range from cost-effective savings schemes, to advanced wealth strategies. We can also help you upgrade any existing products or policies into new, up-to-date solutions.

With our experienced advisers, you'll benefit from straightforward, pragmatic advice for every scenario.

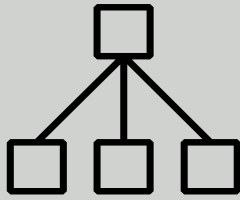
Mortgage Services

Brookson Financial are committed to making mortgages easy – we can arrange mortgages for people from all walks of life but our expertise really comes to the fore when talking to customers who find it difficult to fit the lenders standard criteria – this includes contractors, interims, partners, directors and other self-employed individuals.

What's more, Brookson Financial are equipped to support those who have suffered from credit issues in the past. By using our market experience and reach, our experts can find fantastic deals just for you that you won't find anywhere else. We work hard to secure you competitive rates no matter what your financial situation may be.

DID YOU KNOW . . .

Every Brookson customer is assigned a personal advisor who understands your individual circumstances and needs, explains our services in a straightforward way, and supports you through your financial journey. **visit brooksonfinancial.co.uk to find out more**



BROOKSON FINANCIAL SERVICES AT A GLANCE

With our comprehensive expertise, you can navigate the complex world of financial services and benefit from the right solution designed specially to meet your needs.

Protection

- Life Assurance
- Income Protection
- Critical Illness Cover
- General Insurance
- Business Insurance

Wealth management

- Pension Savings
- Pension Transfers and Switches
- ISAs
- Investments

Mortgages

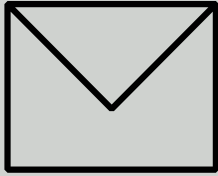
- First Time Buyer Mortgages
- House Move Mortgages
- Re-Mortgages
- Buy-To-Let
- Mortgage Protection
- Buildings and Contents Insurance

Get in touch



Call the Brookson Financial team to find out more or to book a free initial 30 minute consultation*

01228 55 00 55



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If you would like to find out how Brookson Financial can help you shape your future, please contact the Financial Team on 01228 55 00 55 or email advice@brooksonfs.co.uk

01228 55 00 55
brooksonfinancial.co.uk

INNOVATION
+ KNOWLEDGE
+ SUPPORT

01228 550 055

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This document does not constitute financial advice and should not be taken as a recommendation to purchase or invest in any financial product. The value of a market investment can go down as well as up and you may not get back the full amount, particularly in the short term. Before taking any decisions, we recommend that you seek advice from a qualified financial adviser or a lawyer is for information purposes only. Your home is at risk if you do not keep up mortgage repayments. This document is intended to provide information only and reflects Brookson Financials understanding of legislation at the time of writing.

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