map wealth management FINANCIAL

Give your dreams **direction**

WELCOME TO
MAP FINANCIAL

Life and finances would be so much easier if they were straightforward, but if we've learnt anything from the events of recent years, it's that we need to expect and embrace the unexpected.

At MAP Financial, we understand that life's twists and turns impact everyone's personal situation. This is why getting to know you personally as well as financially has been our number one priority since we established in 2001. We've never operated on a one-size-fits-all basis and we enjoy the challenge of listening to what you want to do and where you want to go in life. We then translate that information back into what you need to do or can do now in terms of financial planning and help you to create a strategy going forward.

It really doesn't have to be about big numbers initially. Whatever your stage of life, we will take a snapshot of where you are, then talk to you about your current and future goals. That might be anything from getting onto or moving up the property ladder, to affording the lifestyle you want when you retire. It could be that you have the other 'problem' of coming into money later in life and you need help to know how to manage those funds effectively. There's a myriad of investment, pension, mortgage and insurance options. We make it our job to discover your personal priorities and present you with the options that not only make financial planning sense for you right now, but can also help prevent potential financial problems going forward. Our aim is to be there when you need us and give you total peace of mind regarding your future financial security.

ANDREW POPLE
DipPFS; MAQ
Founder, CEO, Director

LIFE STAGES

Whatever your stage in life, our start point is to understand what is important to you so we can help you make the very best financial decisions. We will come up with suggestions and advice for what's current and then we stay with you, helping you to make financial adjustments to suit whatever life throws at you. We build strategies that incorporate safeguards to help you and your family through difficult times whilst embracing your hopes and dreams.

In short, we help you make 'intelligent decisions' about money.

Build

Day to day budgets might be tight when you're starting out, but now's the time to begin giving your dreams direction. In the first ten years of working life, you could also see a dramatic growth in your wage package and may need help with how to best manage it while you're still free of family responsibilities. Our up to date knowledge of government incentives and the latest savings schemes across the financial sector will help you choose the best solutions.

- Savings
- Mortgages
- Early pension planning

Protect

Your priority now is to support the family, making sure they'd be safe, should anything happen to you. You'll also want to put into place plans to give them the very best start in life.

- Life insurance
- Critical illness/income protection
- School fees planning
- Pension Health check

Transition

Now's the time to think across the generations: launching the younger ones; making plans with the older ones and putting earned and inherited wealth to work for future comfort.

- Investments
- Pension health check
- University support
- Trusts
- Covenants

Benefit

How you use your pension and any accumulated wealth now will impact the rest of your life as well as the lives of those you will leave behind. We can guide you through the complexities of equity release, tax law, savings and investments to help you build the best future security for your circumstances.

- Lifetime mortgages
- Pension drawdown
- Income generation
- Care home funding
- Inheritance tax
- Wills

WEALTH MANAGEMENT

To fail to plan is to plan to fail. But not all plans are the same! We firmly believe everyone should have the financial equivalent of a Savile Row service. No two clients are the same, so we don't see why their financial plan should be either. However much (or little) you have, you should be able to access top class performance. We put your wealth to work by employing solutions that constantly monitor your portfolio with potential savings over traditional options. The uncertain nature of the world we live in means that investment markets are in constant flux, so at MAP Financial, we endeavour to keep you abreast of political, commercial and global events that might affect the market, bringing reassurance through leaner times. Whether you want a true 1x1 relationship with a top fund manager, or a simple solution to make your money work harder, we have the answers.

Please remember that the value of an investment and the income from it can go down as well as up and you may get back less than you invested.

HOW **WE WORK**

Getting to know you is the key to how we work. By understanding your hopes, dreams and aspirations, we can pinpoint the best strategies and create a bespoke financial plan for you. We combine our own extensive knowledge and expertise with that of our network of professionals including legal and tax experts, in order to recommend the most appropriate solution for your current and future needs. Even more importantly, by getting to know you now, we can be there for you at times of change, helping to steer you through difficult periods as well as making your wealth work effectively for you and your family.

Meeting

The purpose of our first meeting will be to develop a clear understanding of your current situation. This will include your immediate objectives. We will also discuss risk at length. We certainly won't suggest a solution that doesn't fit with your core values. We employ various methods of information gathering and it may be that we ask you to complete some information prior to our meeting so that our time together is focused on you.

Recommendations

Having researched the market and reviewed an extensive range of products and providers, we'll prepare a document outlining a strategy specifically tailored to suit your current situation and your future goals. Once you've had time to digest this, we'll take you through our recommendations in detail, explaining why we've chosen specific solutions and products.

Action Plan

Once you're happy and we have agreed on the best strategy, we will take care of all the paperwork, liaising with professionals such as accountants and solicitors where appropriate.

Going Forward

We will be there for you as life changes and moves on. We will help you review your goals and make adjustments to your financial plan as necessary. After all, what's right today, may not be right tomorrow! Because we keep abreast of the latest financial products, we are in the best position to help you think through your next step toward financial nirvana. We will help you through both the challenges and the joy of life.

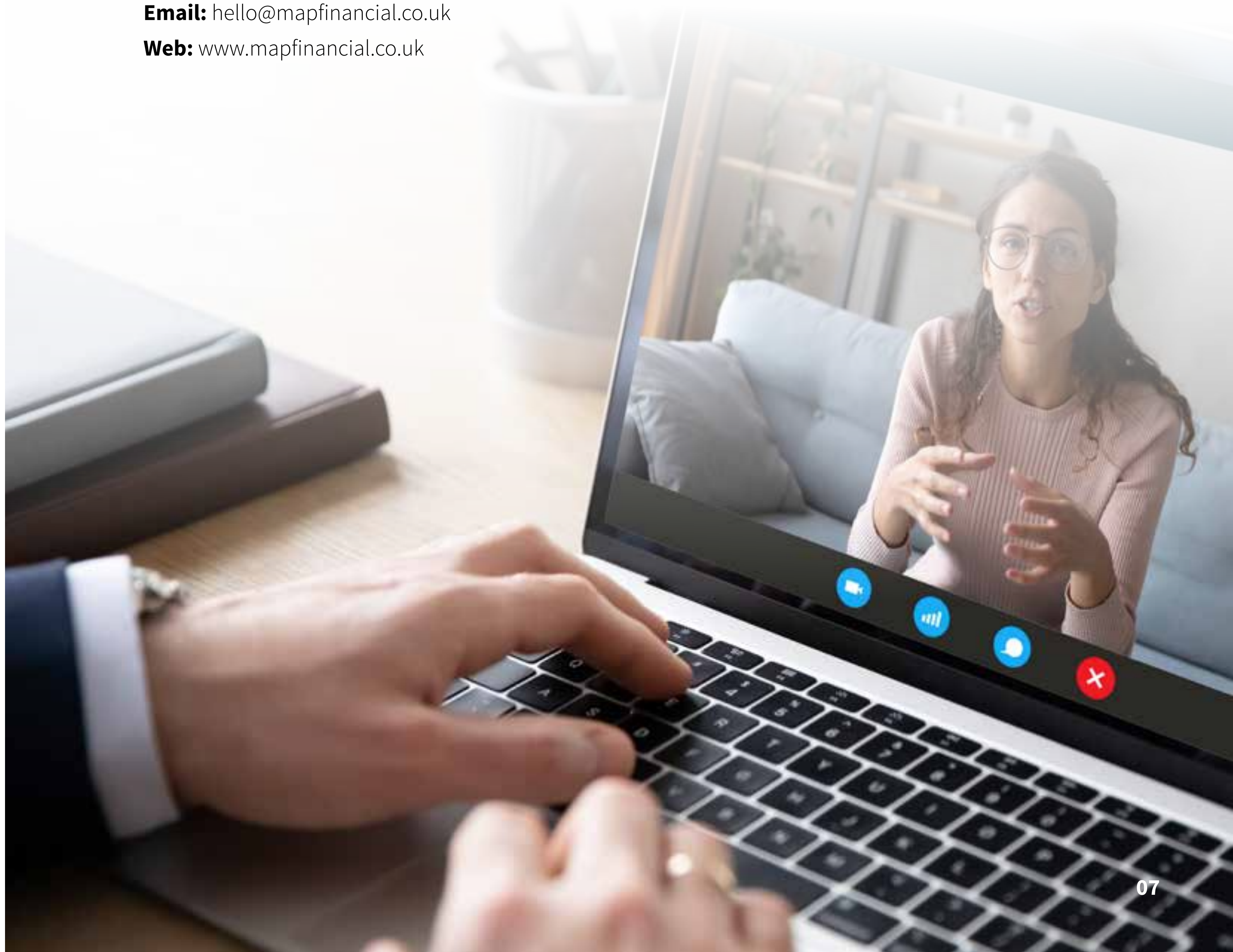
MEETING UP, **KEEPING IN TOUCH**

MAP Financial is based in Liphook, Hampshire. However, we don't put limits on geographical location. We embrace technology and can set up virtual meetings so we can always have face to face contact no matter where we are in the world.

Once you've become a client, we'll send you your own individual 'client site' link so you can stay connected. We even have an 'app' that you can use to keep up to date with the value of your investments and check how you are progressing towards your financial goals.

MAP Financial – ***big enough to make a difference, small enough to care.***

Tel: 0330 3300013
Email: hello@mapfinancial.co.uk
Web: www.mapfinancial.co.uk



Working together to make informed decisions about your financial future

Award-winning independent financial advisers, MAP Financial provides bespoke impartial, objective advice.

These are an example of what we can source. Please contact us for a full list.

PRIVATE CLIENT SERVICES

Working together with our clients, we develop financial planning strategies designed to meet current and future goals and dreams, whilst protecting and growing your wealth.

- Pension planning
- Tax planning
- Life and health insurance
- School fees planning
- Estate planning
- Investments

CORPORATE SERVICES

MAP Financial have the expertise to help business owners develop a robust financial planning strategy from employee benefits through to business protection and commercial Corporate Financial Planning Advice.

- Group pensions
- Corporate insurance
- Corporate financial planning
- Group Life Cover
- Group Income Protection

Tel: 0330 330 0013 **Email:** hello@mapfinancial.co.uk **Web:** www.mapfinancial.co.uk