

Hello

I'm Caroline Anstee, founder of anstee & co, an exciting new concept in financial design.

Whether you are just starting out, have had a change of circumstances or are anxious to preserve your hard-earned wealth, our experienced team can provide expert, professional advice to create a financial plan to suit your needs.

The main aim of anstee & co is to build a trusting relationship designed to offer an exceptional personal service to help you plan for a secure financial future.



Have you ever reviewed your financial arrangements?

It is really important to do so, as there are so many aspects to consider. The list is long. These are just some of the questions to be answered:

- Are your investments performing well and do you know how inflation affects them?
- Are you investing tax-efficiently and are your investments risk aligned?
- Have you planned to minimise inheritance tax?
- How will your family cope if you can't work or you die?
- Have you made a will yet?
- Has your employer setup your pension and do you know what it will provide in retirement?

Our advice covers many areas, for both personal and corporate clients, including:

- | | |
|---------------|-------------------------------|
| • Savings | • Long Term Care |
| • Protection | • Inheritance Tax Planning |
| • Pensions | • Equity Release ^Δ |
| • Investments | • Automatic Enrolment |
| • Mortgages* | |

^ΔTo understand the features and risks of an Equity Release Scheme, ask for a personalised illustration. We will discuss your payment options with you and confirm the actual amount payable before we begin to provide you with our services.

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

Financial Health Check

I would like to arrange for a free initial consultation. I am particularly interested to learn more about:

- | | |
|-----------------------------|--------------------------|
| Retirement/Pensions | <input type="checkbox"/> |
| Investment/Savings | <input type="checkbox"/> |
| Family Protection | <input type="checkbox"/> |
| Income Protection | <input type="checkbox"/> |
| Critical Illness | <input type="checkbox"/> |
| Private Healthcare | <input type="checkbox"/> |
| Inheritance Tax Planning | <input type="checkbox"/> |
| Wills/Trusts | <input type="checkbox"/> |
| Company Pensions | <input type="checkbox"/> |
| Auto Enrolment | <input type="checkbox"/> |
| Shareholder Protection | <input type="checkbox"/> |
| Keyperson Protection | <input type="checkbox"/> |
| Mortgages* | <input type="checkbox"/> |
| Equity Release ^Δ | <input type="checkbox"/> |
| Other (Please List) | |
| | |

Name

Address

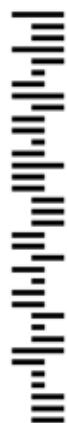
Home phone

Mobile phone

Email

Preferred method of contact





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