

Mortgage and Protection Journey

At Welby we like to work with our clients to assist them with all of their needs.

Whether you are buying your first home, moving home, building your own home, re-mortgaging or considering equity release. We provide advice in the best way to protect your mortgage and family.

We work for you to ensure you benefit from the right choices.

INITIAL CONSULTATION

- Getting to know us and how we can help you
- We get to know you
- By understanding your financial goals and objectives in relation to your mortgage and related protection needs we are able to identify how we can help
- We confirm whether these are areas we can help with

DISCOVERY MEETING

- Analysis of your current financial situation in relation to your mortgage and protection needs
- Completion of a detailed budget planner
- Understand your attitude to mortgage risk
- Review your current arrangements
- Establish your requirements

ANALYSIS OF NEEDS

- Research carried out based on your specific requirements
- Reviewing and consideration of any existing mortgage and protection in place

FINALISING

- Completion of any paperwork
- Liaise with the mortgage lender and protection providers as required
- Regular contact with you throughout to provide you with updates
- Prior to completion communication to ensure everything is in order

PRESENTATION OF RECOMMENDATIONS

- As many meetings as you require
- Objective is to understand the reasons for our recommendations
- All questions to be answered
- Agreement to proceed with recommendations

RECOMMENDATIONS

- We advise on the most suitable providers recommended from a comprehensive range of mortgages from across the market
- We advise on the most suitable protection providers recommended from the whole of market
- Individually tailored recommendations to meet your goals
- Normally within 1 week after analysis of your needs for mortgages
- Normally within 1-4 week after analysis of your needs for protection

Get in touch

If you have queries or would like to discuss any aspect of retirement planning, get in touch.

Call +44 (0) 2892 622 910

Email info@welbyassociates.co.uk



**FREE initial
consultation**

welby.
we work for you

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