

Protection Journey

At Welby we like to work with our clients on a long-term basis to assist with all of their protection needs.

We provide advice on the best way to protect your family, mortgage, business and your financial future.

We work for you to ensure you benefit from our advice to make 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 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 protection needs
- Review your current arrangements
- Establish your requirements

RECOMMENDATIONS

- We advise on the most suitable protection providers recommended from the whole of market
- Individual tailored recommendations to meet your goals
- Normally within 1-4 weeks after analysis of your needs for protection

ANALYSIS OF NEEDS

- Research carried out based on your specific requirements
- Review and consideration of any existing protection plans in place
- Consider your immediate, medium and long-term needs and goals in relation to protection

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

PARAPLANNING

- Formal Report prepared summarising recommendations
- Normally within 1-4 weeks of formulating your recommendations and prior to commencement of accepted recommendations

FINALISING

- Completion of any paperwork
- Liaise with the protection providers as required
- Regular contact with you throughout to provide you with updates
- Prior to commencement of recommended plans communication to ensure everything is in order

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

Welby

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