

Useful documents to bring to meeting:

Photographic identification
National Insurance number
Recent bank statement
Details of insurance policies you hold
Details of pension schemes

How can I contact you?

Telephone: 02892 622 910
Email: info@welbyassociates.co.uk

Our offices are located on the 1st floor within The House of Vic-Ryn.
Our business hours are 9.30 – 17.30, Monday to Friday.

We can accommodate evening or Saturday appointments on request and are available to advise throughout Northern Ireland.

Savings and Investments
Pensions
Retirement Planning
Tax Planning
Wills and Trusts
Mortgages and Insurance

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

Welby

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Frequently Asked Questions

What services do Welby provide?

Welby provide genuine financial advice that is supported by an experienced team. We build relationships with our clients to effectively advise and manage individual plans. Many financial products are very complex and it is our job to simplify and make finance as clear as possible for our clients, be it a personal account, business or trust. We work on your behalf to ensure you benefit from the right choices.

Welby are Chartered Financial Planners

The corporate chartered mark means we are fully committed to professional standards and ethical practices that we are proud to uphold. We invest in developing our staff expertise to deliver the highest standard of care for our clients.

What are your fees?

Your initial consultation is always free, no fees or charges are applied. We like to get to know you at this meeting. There is an opportunity however, to support others by making a donation to our chosen charity.

Our fees will be discussed with you at the initial meeting and will be clearly set out in a letter of engagement if you decide to become a client. The level of fee varies depending on which service we are providing for you. Welby are totally transparent with fees and fair in our charging structure.

Mortgages*

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

What protection do I have to ensure your advice is correct?

Compliance is an integral part of the business and Welby strive to deliver an exceptional service for our clients ensuring our advice complies with current regulations and business practice guidelines. We are directly authorised and regulated by the Financial Conduct Authority (FCA) and are listed on the Financial Conduct Authority register.

Does Welby hold my money?

No, you will never invest capital directly through our firm. Investments are paid via cheque to the provider directly and sent with an application form. We complete this form with you and post on your behalf.

Can Welby work with my accountants and solicitors?

Welby are happy to work alongside clients' existing legal and professional advisors to facilitate an optimised approach.

What should I consider before using the services of a financial advisor?

Take the time to check the following before appointing any financial service provider.

- Professional experience
- Qualifications and certifications
- Charging structure
- Associations or affiliations
- Independent or restricted status

Please feel free to ask any questions at any time about the Welby company profile.