Our services explained

THE ADVANTAGE™

Our full holistic service

THE **MINSTER** PARTNERSHIP

CARE & LATER LIFE ADVICE

Contact Connection

When we receive your initial enquiry we contact you to find out more about your circumstances and to see if we can help.

What to expect

A telephone or face to face meeting. At the end of this initial discussion we should all have a good idea whether we can help.
The cost will be covered by us for the first 45 minutes.

Follow up

We send you a personal letter confirming our understanding of your circumstances and to let you know The Advantage™ is the right service for you. We will call you to discuss our firm's fixed fee and confirm this in writing.

ADVANTAGE ENGAGEMENT

When you have decided to engage our services, we send you all the paperwork to get us started.

Initial work

As soon as we receive the paperwork and agreed initial fee, we will contact you to collate information to commence the underwriting process for Immediate Care Plans (ICPs).

At the same time, we will prepare letters of authority to enable us to find out all about your current investments and savings.

Once you've let us have everything we need, you can get back to normal as we work hard to get information and process applications on your behalf.

We will keep you informed of our progress and book your Options & Insight Meeting date.

OPTIONS & INSIGHT MEETING

You will meet up with your Later Life Specialist who will take you through our findings on your current investments and cover all the available options for funding lifetime care fees.

You will have a full report on your Options and feedback on all your investments and savings.

Next steps

After your Options & Insight Meeting, we continue to process applications and once we have all we need, we will arrange your Lifetime Solutions Meeting at a place and time to suit you.

LIFETIME SOLUTIONS MEETING

Our recommendations for the most suitable unique plan for your circumstances will be presented at the Lifetime Solutions Meeting. This is a face to face meeting with all the decision makers present.

We help you decide on the best ongoing service to ensure continued advice and monitoring of the recommended financial plan.

Bonus Service

Our goal is to get the best possible outcomes for you, which includes negotiating on premiums for Immediate Care Plans (ICP) and reducing costs whenever possible.
We have been very successful in reducing ICP premiums by more than our fixed fees, although this is not guaranteed.

Implementation

Our service includes implementing every aspect of the advice, always taking taxation into account.

Confirmation of Advice

You will be presented with a full Confirmation of Advice Report documenting the advice given, together with a Product and Services Report which gives every detail of the services and products recommended.

Our Fees

Our fixed fee is payable in three instalments with the first on engagement, the second at the Options & Insight Meeting and the final fee at the Lifetime Solutions Meeting.

AD HOC MEETINGS

We are happy to arrange further meetings in more complex situations.

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01202-022772 www.tmpcare.co.uk

SOLLA Society of Later Life Advisers

SOLLA RETIREMENT