

# Financial Planning Surgery

Venue: **Wells Golf Club**

When: 2pm every second Wednesday afternoon of each month

**Format:** Come and join us for tea and biscuits for a short and to the point drop-in surgery - to go some way to answering queries and give guidance to any questions relating to concerns you may have regarding your financial planning; or indeed the challenges we all face to ensure our estates are in good order and structured efficiently.

Plainly, with a 'drop-in' type arrangement it will not qualify as advice and is without cost but will hopefully point you in the right direction to seek regulated advice, whether it be legal or financial, or if you prefer, lead on to a formal meeting for a full financial review at another time.

As you would expect all information will be treated in the strictest confidence and you would be under no obligation to proceed any further.

As a main sponsor to Wells Golf Club we have been looking at providing additional benefits to the membership, and this has led us to look at establishing 'drop in' surgeries in the Clubhouse, on a given day per month.

Partner Practice of St. James's Place Wealth Management

The title 'Partner Practice' is a marketing term used to describe St. James's Place representatives

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