

Brancaster House Financial Planning



About Us

At Brancaster House Financial Planning, our team of experienced financial planners is devoted to helping you meet your long-term financial goals. We provide personalised advice from our HQ in Norwich, Norfolk, based on your individual aspirations, taking into account both the risks and rewards of any strategy.

Our team is committed to providing exceptional service and advice tailored to your individual needs. We believe that financial advice should be accessible to everyone, which is why we offer a range of services to suit all budgets and financial goals. With our help, you can rest assured that your financial future is in safe hands.

Our Values

We offer clear and understandable, truly Independent advice to both individuals and businesses so that you can be certain you are making the right choice.

We also believe in financial education for all, so we have lots of tools and resources for every step of your financial journey.

We're here for your whole journey.

Starting Out

Here to guide you in the first stages of your financial life. Whether you are considering your **first mortgage**, opening an **ISA** or setting up a **pension**, we can help. Creating the foundations for your financial future is essential, this starts with financial education and getting to grips with topics including budgeting, **rainy day funds** and understanding key financial factors like your **credit score** or the risks associated with **investing**.

Empty Nesters

At this stage of your life, you are likely to have time and money on your hands. You'll likely be less risk-averse and keen to get your financial plans locked down for the future. We are here to guide you on the best way to maximise your finances for the future. From assisting your family with their **financial independence**, reviewing **insurance policies** and refining **retirement plans** or **repaying your mortgage**, our team are here to help.



Creating a pension

First time buyer

Starting a business

Financial protection

Re-mortgage

Inheritance

Retirement planning

Equity release

Mortgage repayment

Inheritance planning

Pension draw down

Later life care

Nesters

If you are expanding your business, your family or upsizing your property, we are here to help. You'll want to get things in place for a successful future whilst juggling the demands of a busy life. This could include setting up **financial protection** for you and your family if the worst should happen such as a death or ill-health, or **saving** for your children's future. We can also help individuals and families with guidance around **inheritance** or windfalls, extracting **profit from business** and other unexpected surprises.

Winding Down

Business sales, **equity release** and **pension drawdown** will all come into play at this important life stage. We're expertly equipped to guide you through the challenges and joys that come with this life stage. No one wants to think about **inheritance tax planning** or **later life care** but we work with our customers to find the right solution to their needs. Our team are also on hand to help with tax-efficient **retirement** income planning as well as releasing **capital** from your home.

The Benefits of Working with a Financial Planner

Advice is often about plans as much as it is about particular products and services.

Expert financial advice can be invaluable if:

- you need help making certain decisions
- you want to make sure your tax and general finances are in order
- you're dealing with financial issues that can become complex and time-consuming.

When it comes to navigating the intricate landscape of personal or business finance, partnering with a skilled financial planner can be your compass to prosperity. At Brancaster House Financial Planning, our team go beyond mere number crunching; they become your strategic allies in achieving financial well-being.

Imagine having a dedicated professional to demystify complex investment products, tailor a roadmap for your unique goals, and fortify your financial security.

Whether you're planning for retirement, investing for the future, or safeguarding your assets, our team's holistic approach ensures that every decision aligns with your aspirations.

With Brancaster House, the benefits extend far beyond managing money—they encompass peace of mind, strategic growth, and a trusted partnership that propels you confidently toward financial success.

To find out more and organise a free financial health check, visit our website:

brancasterhouse.co.uk/healthcheck