

Other Services

Income Protection

The loss of income due to long-term illness can prove to be catastrophic in terms of continuing to pay off a mortgage and other regular bills and expenditure.

We can find the best product to suit your circumstances.

Inheritance Tax (IHT) Planning

A huge increase in property prices in recent years has seen more and more people finding the value of their estate liable to IHT.

Our company specialises in providing the most appropriate solutions to mitigate this tax.

Review Service

In addition to providing advice on new products and services, we are happy to review any existing financial arrangements you may already have in place.

Any concerns about the performance of your savings and investments will be addressed through this service.

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Independent Financial Advice



Mortgages, Insurance Investment & Pensions



www.colliefinancial.co.uk

Authorised and Regulated by the
Financial Services Authority



Introduction

James & George Collie Financial Services Ltd was established in 1993 to provide Independent Financial Advice. The company has grown in strength and our client bank has increased significantly, with both new clients and the retention of existing clients.

Our staff are dedicated to providing a friendly and professional service to all our clients. The wealth of experience our advisors have gained from working in many sectors of the Financial Services Industry ensures that our clients are provided with advice to meet all their financial needs.

To speak to an advisor:
Telephone: 01224 581581
or email: info@colliefinancial.co.uk

Mortgage & Insurance Services

James & George Collie Financial Services Ltd offers mortgages from the whole of the market. Having assessed your needs we are then in a position to advise and make a recommendation to meet your requirements.

We will not normally charge a fee for the services, but in certain circumstances this may be necessary.

Services Available

- House Purchase
- Remortgages
- Buy to Let/Second Home
- Right to Buy
- Life Time Mortgages
- Mortgage Protection Assurance
- Mortgage Payment Insurance



Think carefully before securing other debts against your home.

Your home may be repossessed if you do not keep up repayments on a mortgage or other loans secured on it.

Investment & Pension Services

A key aspect of the services offered by **James & George Collie Financial Services Ltd**, is providing advice to new and existing clients regarding their Investment and Pension requirements.

Our aim is to create and protect the wealth of all our clients and this comes from providing good quality, jargon free advice.

We offer an initial consultation (without charge) when we will describe our services more fully.

The advice provided will be on products available from the whole of the market once we have assessed your needs and made recommendations to you.

Investments & Savings

- ISA/PEPs
- Unit Trusts/OEICs
- Investments Trusts
- Investment Bonds
- Offshore Investments



Pensions and Retirement Planning

The need for good quality Independent Pensions Advice has become more apparent recently, due to the fact that many people are not saving enough for their retirement.

Our company advises on the full range of Pension products including Personal Pensions, Stakeholder Pensions, Self Invested Personal Pensions (SIPPs), Directors Pensions and Company or Group Pension schemes.

The value of your investment can go down as well as up and you may get back less than you originally invested. Past performance is not a guide to future performance.