

RESPECTED BY ITS PEERS. APPRECIATED BY ITS CLIENTS.



PARSONAGE



Parsonage, an expert financial planning practice, is based in Lymm, Cheshire. The business was established in 2009 by Chartered and Certified Financial Planner, Flora Maudsley-Barton.

We promote high quality impartial advice, free from any product or provider bias. Parsonage puts its clients and their objectives at the centre of the planning process.

## Customer Charter

- You stay in control of your money
- No contract term – you choose how long you need us for
- We will use the most tax-efficient solution that suits you
- We will work alongside your other professional advisers to assist you
- You will know what you are paying, and why it's worth paying for
- We want strong, long-lasting relationships with our clients
- We constantly strive to improve

“Chartered status requires a code of ethics that other financial advisors do not subscribe to. At Parsonage, we believe only in giving sound, clear and easy to understand advice.”

Flora Maudsley-Barton - Proprietor & Chartered Financial Planner

# MAKING YOUR MONEY WORK HARDER

## Services to clients

Our expert guidance and planning covers many topics, including; retiring, becoming suddenly wealthy, selling a business, passing wealth to the next generation, managing investments, maintaining an income stream, protecting wealth, advising trustees, needing to raise money during retirement as well as advice about divorce, redundancy and bereavement.

The list of services we provide to our clients continues to grow.

## Services to professionals

Your client may require detailed advice outside your main area of expertise. Our belief is that professionals need to work together to provide the best possible client service.

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

Equity release could involve a lifetime mortgage or home reversion plan.

To understand the features and risks of these products ask for a personalised illustration

## What can we do for you?

- Investment advice – conventional and pioneering, expertly researched
- Portfolio building – for income, growth, trusts, pensions
- Investment review
- Planning to retire in the future
- Preparing to retire soon
- Pension audit – reviewing your pensions
- Annuity research
- Saving for the future
- Protecting your liabilities – insure your life
- Protecting your income – insure your health
- Protecting your family – insure your spending
  
- Lifetime cash flow planning – bringing it all together
- Bespoke service – advice all the time
- "Tin Box Service" - an itemised list of your assets
- Employment change - redundancy advice
- Divorce advice
  
- Borrowing money for your home or your business
- Rate-chasing – paying less for your debts, insurances and other bills
- Equity Release – lifetime mortgages and home reversion schemes

Contact us in confidence: 01925 758 374  
or email: [flora@parsonage-group.com](mailto:flora@parsonage-group.com)



PARSONAGE

Our vision is for parsonage  
to become well-known  
as a respected provider of  
expert financial planning in  
the Cheshire and Greater  
Manchester region.

## CLIENT SERVICE

Our clients are essential in achieving our vision: We provide an excellent service and they recommend us.

It pays to plan ahead; if you need someone on your side, giving you the best possible advice and helping you to be proactive with your finances, contact us in confidence.



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Parsonage is an appointed representative of Sense Network Limited, which is authorised and regulated by the Financial Services Authority

53 Wellcroft, Lymm, Cheshire, WA13 0LU  
Tel: 01925 758 374, Fax: 08455 271 607  
Email: [flora@parsonage-group.com](mailto:flora@parsonage-group.com) [www.parsonage-group.com](http://www.parsonage-group.com)