Need help finding independent financial advice about care arrangements?
Introduction

It is important to have good financial advice.

It can help you make plans for your life as you get older.

It can help you to pay for the care and support you may need.

Financial advice should be independent, so you feel that you are getting the best advice possible.
How a qualified independent financial adviser can help

They can give you advice about different ways to manage your money, and paying towards the care and support you may need.

Equity release

This is when you borrow money using the value of your home as security.
You can stay living in your home.

Long term care funding

This is about planning for care you may need as you get older. Some people need care for many years.

Pensions and annuities

Pensions and annuities give people an income after they retire from work.
Investments and savings

This is about how you use the money you have saved, or invested in things like stocks and shares.

Tax planning

This is about how much tax you pay the Government. You may have to pay tax on your income and savings.

How to find the right independent financial adviser

Surrey County Council must tell you where to find independent financial advice about care and support.

We cannot tell you which independent financial advisor to use. You must choose the advisor yourself.
The Society of Later Life Advisers (SOLLA)

SOLLA was set up in 2008.

It is a not for profit organisation that helps people to find the advice they need as they get older.

We suggest you choose one of the members of the Society of Later Life Advisers (SOLLA).

Why use a SOLLA member?

All SOLLA members have had specialist training which is checked by the Financial Conduct Authority.

They have financial, tax planning, equity release and long term care qualifications.

They understand the needs of older and vulnerable people who may have difficulties making big decisions.
How to find a SOLLA accredited advisor

Phone: 0845 303 2909

Website: www.societyoflaterlifeadvisers.co.uk

You can search for an adviser on the SOLLA website

Type your postcode in the search box and you will be shown a list of advisers who are near your home.

Ask about any charges when you first contact SOLLA

Some services The Society of Later Life Advisors can give you are free and some they charge money for.

Please note: This is a signposting service to help people find an independent financial adviser. Surrey County Council is not responsible for the products, policies or services offered by SOLLA accredited advisers, and will not be liable for any damages or losses, however caused, or suffered by any person who relies on information and advice provided by a SOLLA accredited adviser.
If you would like the information in this leaflet in large print, Braille, on CD or in another language, contact us on:

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