



SURREY
COUNTY COUNCIL

**Need help finding
independent financial
advice about care
arrangements?**

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Introduction

For many residents, it's important to have sound financial advice in order to make carefully considered plans for later life, or to help with care costs.

Such advice should be independent, so you feel confident that you're getting the best advice possible.

A suitably qualified financial adviser will be able to provide impartial advice and help you navigate through the complexities of care funding, such as:

- equity release
- long term care funding
- pensions and annuities
- investments and savings
- tax planning.

Local authorities are required to help signpost people to independent financial advice about care and support. We cannot make a recommendation to use one particular financial adviser but we can signpost you to sources of help. We suggest you make your own choice by selecting one of the members of the Society of Later Life Advisers (SOLLA).

Why use a SOLLA member?

All SOLLA members are specialists in advising people on financial matters in later life.

SOLLA operates a rigorous accreditation process where individual advisers, rather than the company they work for, achieve Later Life Adviser Accreditation and become registered with SOLLA. This requires holding appropriate financial/tax planning, equity release and long term care qualifications regulated by the Financial Conduct Authority; and achieving a 'soft skills' standard demonstrating a knowledge and understanding of the needs, capacity and issues of dealing with older or more vulnerable clients.

How do I find a SOLLA member?

Finding a SOLLA accredited advisor is easy. Simply visit societyoflaterlifeadvisers.co.uk and enter your postcode which will produce a list of advisers within a pre-determined radius of your home. You can then choose which adviser you wish to contact.

SOLLA can also be contacted as follows:

- **Telephone:** 0333 2020 454
- **Textphone (via Relay UK):** 18001 0333 2020 454
- **Email:** admin@societyoflaterlifeadvisers.co.uk

Charges

Please note there may be charges for some services, so we recommend you that you ask about any charges when you first make contact.

About SOLLA

SOLLA was founded in 2008 as a not-for-profit organisation, to meet the needs of consumers seeking later life advice. It aims to ensure that consumers are better informed about the financial issues in later life and can find an accredited adviser.

Disclaimer

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.

How to request this information in an alternative format or language

If you would like this information in an alternative format or language, please contact us on:

- **Telephone:** 0300 200 1005
- **Textphone (via Relay UK):** 18001 0300 200 1005
- **Text (SMS):** 07527 182861 (for the deaf or hard of hearing)
- **British Sign Language:** www.surreycc.gov.uk/bsl
- **Email:** asc.infoandadvice@surreycc.gov.uk
- **Website:** www.surreycc.gov.uk/adultsocialcare

Updated October 2024