



# UK PENSION TRANSFERS

- Significant Tax Advantages
- No Compulsory Annuities
- Possible Early Access to Funds
- No Bank Transfer Fees
- No Exchange Rate Issues
- No Losing Track of Your Fund
- Full Fund Will Go to Your Estate in the Event of Death
- Regular Reviews and Monitoring of your Retirement Portfolio

**Contact our Principal Advisor:**

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**Hallam Jones**

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## *What we specialise in ...*

### □ LIFE INSURANCE

- Term Life
- Permanent Insurance (whole of Life & Endowment)
- Trauma or Critical Care Recovery
- Disability
- Permanent Term
- Specialising in Insurance for the Over 50's

### □ INCOME PROTECTION / CONTINUANCE

- Sickness and Accident
- Rural Income Protection

### □ SUPERANNUATION

- Business Superannuation
- Personal Superannuation
- Employee and Group Life and Disability Benefits
- UK Pension Transfer
- Kiwisaver

### □ SUCCESSION PLANNING

- Business
- Farm
- Family Home
- Keeping it in the Family

### □ FINANCIAL PLANNING

- Term Investment
- Lump Sum Fund Management
- PIE Investments
- Wealth Creation
- On Call Accounts
- Saving for a Holiday
- Home
- Retirement Planning
- Full Projections after Fees and Tax
- Long Term Sustainable Returns Above Bank Rate

### □ BUSINESS INSURANCE

- Key Person
- Partnership
- Shareholder Protection

### □ HEALTH INSURANCE

- Group Health
- Individual / Family

### □ MORTGAGE BROKING

- Financing/refinancing
- Reverse Mortgages – Equity Release for Over 60's
- Top-ups
- Debt Consolidation

### □ FIRE AND GENERAL INSURANCE

- Home / Contents
- Motor Vehicle
- Public Liability
- Marine / House Shifting
- Travel
- Boat

### □ FARM INSURANCE

### □ COMMERCIAL AND BUSINESS INSURANCE

### □ PROFESSIONAL LIABILITY INDEMNITY INSURANCE