

The Second 90 Days

Four excellent things still to do...

Your plan is now up and running, the structure is in place, the investment strategy agreed and implemented.

But there is a lot more to financial planning than pensions and ISAs, investments and insurances. Here are the four areas we would now love to help you with:

TheTCFP Portal

Secure message and sharing documents via the portal are a small part of the story. It can do much more for you.

Why not upload all those important documents? Your passport, the household insurance, various certificates? Below is a list of our suggestions.

There is also a diary where you can add insurance renewal dates, or anything else you want to be sure to be reminded of.

And why not add all those “non-TCFP” accounts? Your work pension, your savings accounts? Your insurances? Your property? And your debts...

You could have a complete picture of what you have, where it is and how much of it there is, whenever you want, plus the documents that relate to them. All in one place. Securely.

The Annual Financial Spring Clean

We promise ourselves we will do this, then we don't.

We'll send you a list at the start of each year via the portal of some things to look at. Maybe not all of them every year, but over three years it must make sense to get through all of them?

If you mind the pennies...

Legacy Documents

Legacy is important, which is why it has its own section on the portal. Please find the time to have a proper look.

In short, we want to help you help your family understand your wishes, what you have and be able to access it with the minimum of fuss when you're not around any more.

It will save hours of heartache and frustration.

Your Family

Let us help your younger relatives – children and grandchildren, nieces and nephews, etc., – get on the right track. This is about being there for them as they set off to University, start work, start a family, etc.

The sooner they are pointing in the right direction and making smarter choices, the better for them. As we say, if you are a degree or two off in your 20s, you could be miles adrift in your 40s.

There are so many decisions to make, so much information to digest; let us help them condense and make sense of it.

The first step is really easy. Get them on our portal where they can find video content, add their own accounts and get in touch with us whenever they want.

Best of all it is gratis, on the house, free of charge. We will send you an email you can send them.



Contact Details

You can email us at advice@townclosefp.co.uk, or ring us on **020 7993 4898**, or complete the contact form below or **book a meeting** with us.

Whatever suits you best, we will respond within one working day.