

Cash flow modelling gives peace of mind

We can help you to visualise your wealth to achieve your dreams and avoid financial pitfalls.



Support children through University

Retire early and travel for a year



Gifting money to children for a house deposit

Pay long-term care costs



Our **Lifetime Financial Planning Service** models various cash flow scenarios helping you visualise how your assets, current and future income and expenditure, life events and other decisions impact your future.

Our **'what if?'** scenarios and assumptions provide an interactive financial experience that is simple and will help you understand how specific decisions or events may impact your financial goals and priorities.

Lifetime Financial Planning Service

Each year Lonsdale Wealth Management financial advisers offer clients a cash flow modelling service as part of our annual review service. We also offer a bespoke cash flow modelling service.

Our financial advisers will:

- ❑ Model your current cash flow position on a graphical timeline by including your assets, current and future income and expenditure information.
- ❑ Discuss your financial goals and objectives and review various 'what if' scenarios with you.
- ❑ Visually assess how different 'what if' scenarios affect your cash flow position and your financial planning over time.
- ❑ Agree your Lifetime Financial Plan based on your cash flow model and financial planning scenarios.
- ❑ Review your Lifetime Financial Plan annually:
 - ❑ Include updated assets, income and expenditure information.
 - ❑ Model new 'what if' scenarios to achieve your financial objectives.
 - ❑ Assess progress towards objectives.

To learn more about cash flow planning visit our website at www.lonsdaleservices.co.uk or call 01727 845 500.



It's never too late
to start financial
planning

LONSDALE

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