

Key Facts / Initial Disclosure Document

Who are we

Money Matters online .co.uk is an estate planning practise intermediary specialising in Wills , Powers of Attorney, trusts (various), inheritance tax mitigation and care home fees planning.

Regulation

We are not required to be regulated under the Financial Conduct Authority however may refer clients to Regulated FCA Authorised firms where such advice is required.

Whose products do we offer?

We routinely offer a Free Will service which is completed in house using our own industry experienced and trained Estate Planners. Our products are in the main bespoke. Other ancillary Financial Services may be offered by FCA Regulated Companies who will offer from a range or from a whole of market perspective.

In such cases third party FCA Regulated Firms will let you know the basis upon which the products and services are being offered.

Which services will we provide you with.

We will routinely offer you a Free Will Review / Will Writing Service. During the taking of your will instructions it may be that other ancillary services will be offered for example Powers of Attorney completion, Tenants in Common Applications, Trusts and Probate Solutions etc.

We may recommend / advise that other Regulated FCA Financial Services Products should be considered, but we do not give advice about such products and services. We do, however, pass on your details to associated FCA Regulated Companies if you wish us to.

What will you have to pay for this service?

Our Free Will service is, as the name suggests free of charge. This is a telephone based service and there will be a charge if you require a personal visit to by one of our estate planners.

What to do if you have a complaint?

E-mail paul@moneymattersonline.co.uk or call us on 0161 7911233.

You can write by post to our registered address which is 35 Southmere Drive, Bradford, BD7 4EA.

Your Will & Estate Planning, information and changes we need to know about?

You must take reasonable steps / care to provide complete and accurate answers to the questions we ask when you take out or make changes to your Will / Estate Planning.

If the information you provide is not complete and accurate

We may cancel the provision of a Free Will / any Associated /Estate Planning Product

We will not be held responsible if the non-disclosure would materially have affected the content of the written will or would have altered the advice given with regards to other estate Planning products.

Your responsibility to read All Documents

When a Will or Related Estate Planning Product are / is issued you are required to read the documents we provide and signing instructions carefully as they form the basis of the advice / product you have chosen.

If you are in any doubt about any of the content of the documents provided please tell us immediately.

Your cancellation rights

You have the right to cancel the writing of your free will / associated estate planning products prior to their production / within 14 days if they are incorrectly produced.

Protecting your data

Under the DATA Protection Act you have the right of access to your personal records held on our files and we will tell you the fee if you ask us for a copy of your information.

Confidential Information is not otherwise routinely shared with other parties unless it is a legal or regulatory requirement.

MoneyMattersOnline.co.uk can be contacted by e-mail on paul@moneymattersonline.co.uk or by Post to our registered office at 35 Southmere Drive, Bradford, BD7 4EA or by Telephone on 0161 7911 233