

Big Picture Financial Planning working with CashCalc

Cash Calc was developed to assist financial planners and their clients in bringing financial planning to life. By building cashflow models we have a starting point to explore various what if scenarios: when can I retire, will I run out of money, what income will my investments provide, how much life assurance do I need, can I afford to move, how will tax and inflation effect my plans. Whatever is important to you, decisions can be made with increased confidence.

Cash Calc also has a secure client portal, an online location designed to help us communicate and share information securely with each other using end to end encryption, which is the best way to send us sensitive documents. You will also find stored documents from us, including our initial disclosure documents which are ready for electronic approval and can be downloaded for your safekeeping.

You will receive an invitation to set up access to your secure portal. To help get the most out of our meeting, whether it's a review or an initial meeting, by zoom or face to face, please complete as much of the fact find as possible. The more you put in about your income, expenditure and existing provisions, the more we can finesse the cash flow and model for different scenarios.

Yours
Jill



Big Picture Financial Planning Limited offers independent financial advice and is an appointed representative of Valid Path Limited, which is authorised and regulated by the Financial Conduct Authority FRN 197107.

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