

# Financial health & wellbeing school surgery meetings

School surgeries specifically for Herts for Learning schools, addressing key financial areas relevant for school leaders.

**WESLEYAN**  
*we are all about you*



HFL Education has aligned with Wesleyan Financial Services to provide specialist financial advice and services for schools, nurseries and other educational settings.

Specialist Financial Advisers from Wesleyan Financial Services have expert knowledge of the Teachers' Pension Scheme and Local Government Pension Scheme and are committed to supporting financial health for the education profession.

They are here to provide support and advice to all staff within schools, helping them make informed decisions about various aspects of their financial wellbeing including:

- ▶ Retirement planning
- ▶ Savings and investments
- ▶ Income protection
- ▶ Inheritance Tax planning\*
- ▶ Fee-free mortgage advice\*\*

\*The Financial Conduct Authority does not regulate Inheritance Tax planning.

\*\*Wesleyan Financial Services will be paid a fee by the mortgage lender upon completion of the loan. Your mortgage is secured on your home. Your home may be repossessed if you do not keep up repayments on your mortgage.

## Surgery days – get involved!

You're invited to book a free surgery day for your staff to support their understanding of current key financial issues relevant to them.

This is a dedicated day for your school, with 30 minute diary slots available throughout for staff to book in a call with a specialist financial advisor and address any concerns they may have.

If you would like to speak with a specialist financial advisor about your personal circumstances or arrange webinars/ surgery days for your school, please get in touch with Ahilan and he will work with you to find a suitable time in the diary.

ahilan.shandrakopal@wesleyan.co.uk

07818 011 524

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Financial Advice: Retirement Planning • Investing • Funding • Insurance

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