

Rated ★★★★★
by our clients


CAPITAL
FINANCIAL SERVICES
Making the most of your assets

Helping Clients Fund Long Term Care with Confidence

SOLLA Accredited advisers
supporting care homes, residents
and families with clear financial
guidance.



Call: 01923 842 282 | email: colin@capitalfs.co.uk | www.capitalfs.co.uk

When care is needed

Financial decisions can be overwhelming



Moving into care is often an emotional and uncertain time for residents and their families. Alongside important care decisions, families are suddenly faced with complex financial questions:

- How will care fees be funded long term?
- How long will savings last?
- Should the family home be sold?
- Are there alternatives available?
- What happens if funds run out?

That's where we can help.

We work alongside care homes to provide families with clear, professional and independent financial guidance, helping them make informed decisions with confidence and peace of mind.

How our guidance and tailored support benefits care homes

01

Clear regulated advice for families

02

Helps smooth transitions

03

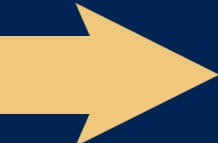
Reduces fees uncertainty

04

Reassures families and care fee management

05

Increases your sustainable funding



“Capital Financial Services has been a trusted guide for our residents, helping them understand their care funding options with clarity and compassion. Their support has been invaluable to our team and the families we serve.”



The types of funding options we can provide

Tailored to individual needs



- **Lifetime Care Annuities** - guaranteed income towards care fees
- **Equity Release** - Unlock property wealth without immediate sale
- **Other Strategies** - including savings, investments & pensions all forming part of the planning for long term care sustainability.

Each solution is tailored to the individual circumstances and needs of every resident, as there is no 'one-size-fits-all' approach.

When to introduce us and the process.

01

When to introduce us

The time to connect with us is:

- New self-funding resident
- Family are unsure funds will last
- Property decision
- Local authority threshold approaching

02

Our Simple Process

We provide clear guidance every step of the way and our simple process is:

- Initial Conversation
- Full Assessment
- Personalised Recommendation
- On going support, if required.



Our Partnership with you. Collaboration makes a difference



We recognise that every care provider operates differently. That's why we focus on building long-term relationships based on trust, professionalism, and open communication.



We work respectfully with your team, keeping processes straightforward and ensuring families feel supported throughout their journey.



Benefits for Care Providers

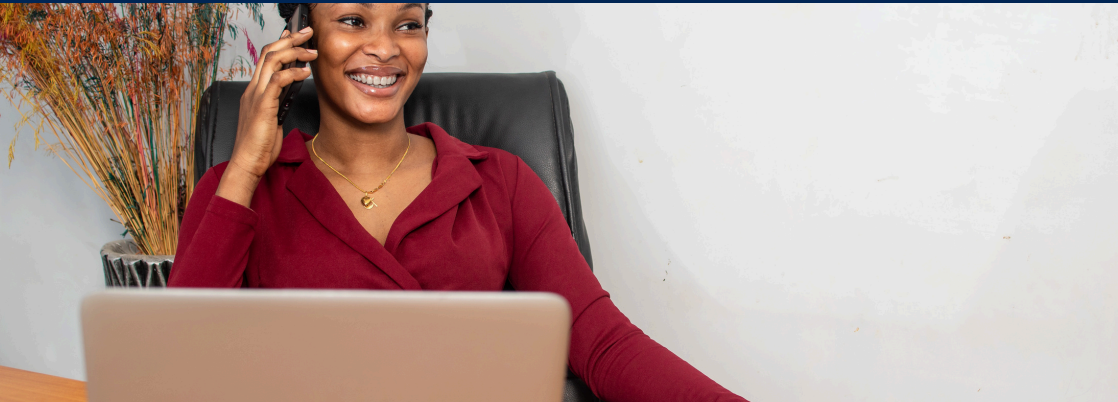
- Greater confidence in residents' funding arrangements
- Reduced uncertainty for families during admissions
- Professional financial expertise from SOLLA-accredited advisers
- Ongoing support as residents' circumstances evolve



Our Commitment - We aim to become a trusted extension of your professional network, supporting your residents while allowing you to focus on delivering outstanding care.



Capital Financial Services Later Life Planning Specialists



Trusted Experience for over 40 Years

Based in Northwood Hills, we have been helping individuals and families with clear, tailored financial advice for over 40 years.

Our friendly team combines over 100 years of expertise to guide you through every stage of life - from buying your first home to planning for retirement, managing inheritance tax, or funding long-term care.

We specialise in Later Life Planning and are proud to be Accredited Members of **SOLLA, the Equity Release Council, and The London Institute of Banking & Finance.**

Authorised and regulated by the Financial Conduct Authority under reference number 977595.

Here to support you and your residents

Contact us to arrange a call or face-to-face meeting to explore how we can support and guide prospective families.

By working together, residents can feel confident about the cost of care, and you can have reassurance that fees will be covered.

We look forward to hearing from you.

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