

Press Release

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Southampton Firm Offers Free Personal Financial Planning Sessions During Financial Planning Week 2019

A firm of financial planners based in Southampton are among a select group of companies taking part in Financial Planning Week 2019.

Running from 7th to 11th October, the annual Financial Planning Week is a national campaign to help engage people with their money and raise awareness of the importance of financial planning. Run by the not-for-profit Chartered Institute for Securities & Investment (CISI), the campaign sees some of the UK's leading financial planning firms offering free sessions to help consumers better understand their finances.

NorthStar Wealth Management, a firm of Chartered Financial Planners based in Southampton are the latest firm to sign up to the nationwide initiative. They will be offering free, one-hour sessions via phone or as 'virtual online' meetings via webcam which can be booked in advance for the week commencing 7th October, via their website at nswm.co.uk/fpweek or by calling 0800 6906 247.

The free, one-hour money management sessions offer a chance for a one-to-one session with a qualified Chartered Financial Planner who can answer any personal finances questions, help identify your biggest financial priorities and explain the steps needed to achieve your goals.

James Thompson, one of the founders of NorthStar Wealth Management and a Chartered Financial Planner explains: "Financial Planning Week is a great opportunity for us to help people in the local area with their finances and work through how they can best achieve their goals in life. We want to help people re-connect with their money, better understand their financial options and take the rights actions towards their goals."

CISI hope the campaign will shine the spotlight on 'financial planning', which they say differs to 'financial advice'. Financial planning they say, helps people to organise their money to achieve specific life goals, whereas 'financial advice' focuses more on financial products. Nationwide, last year's campaign helped over 500 people with their financial planning issues.

"Financial planning is a relationship-based process, which aims to help everyone, no matter what their age or financial circumstances. It allows those with money to plan their spending and saving wisely, but also those without, to work with a qualified financial professional who can support them in reaching their financial goals. Financial planners do not just work with wealthy individuals," said Jacqueline Lockie, Deputy Head of Financial Planning at CISI.

More information about Financial Planning Week can be found at cisi.org/fpweek. To book in your free session with NorthStar Wealth Management, please visit nswm.co.uk/fpweek.

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Additional media resources

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