Help for a widow

- Confused about her options
- No trusted decision makers to help
- Ever-increasing paper mountains
- Panic starting to set in

Client Scenario

Margaret was given a copy of Anita's book – A Widow's Guide – by a friend who had been a client of Anita's for many years. Having been widowed five years earlier, Margaret had inherited several investments and savings accounts from her late husband. Even though she had taken advice and invested with her local bank, Margaret still didn't really understand what she had and her contact there had since moved on. The relentless stream of paperwork from these investments, HM Revenue & Customs and her pension schemes was becoming too much and she became increasingly confused and worried by it all.

How we helped

Having plucked up the courage to get in touch, we asked Margaret to let us have her mountain of paperwork. This, in itself, lifted the burden. We created a simple folder with all the important items clearly labelled and, with her permission, shredded any unnecessary papers leaving her with a more manageable system. Having reviewed her investments, we were able to reduce the amount of risk Margaret had been taking and simplify the structure of her affairs, giving her a clearer understanding of what investments she now had and, more importantly, why. We were also able to organise the completion of Margaret's tax returns and provide most of the information required without having to trouble her.

What it meant for Margaret

Margaret now says that she can't imagine life without us as her trusted advisors and decision partners. She feels she has taken control and now regained peace of mind. We sit down together once a year to review everything and Margaret knows that if she has any worries or concerns we are just at the end of the telephone.

For more information on how we can help you email Jo at advice@cre8wm.co.uk

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