**ECCLESIASTICAL FINANCIAL ADVISORY SERVICES**
Independent financial advice from a company you can trust

# Who are we?

Ecclesiastical Financial Advisory Services Ltd (EFAS) are a firm of independent financial advisors wholly owned by the Ecclesiastical Insurance Group.

The group have offered financial advice to clergy since 1919 and have offered a completely independent financial advice service since 2009.

## What services do EFAS offer?

### Personal Financial Planning

Our experienced independent financial advisers are specialists in advising clergy on all financial matters such as

- Clergy pensions and Retirement Planning
- Saving and Investing (including ethical investments)
- Life insurance and income protection
- Mortgages specific to the needs of those living in tied accommodation

Our personal financial planning services are fee based but there is no charge for the first meeting and all charges are agreed upfront before any commitment is made on either part.

### Financial Planning Seminars & Presentations

We offer a range of seminars to support clergy financial wellbeing which include:

- Speaking at pre-retirement events
- Speaking to new curates about financial matters and the importance of planning ahead
- Speaking at events aimed specifically at supporting house purchase

These can be arranged by us or we find supporting events arranged by the Diocese or ministerial development team, work well.

As we are independent advisers the objective of these events is to inform and help attendees understand financial issues rather than focus on products.

### Where do we operate?

The team cover the whole country and can be contacted on **0800 107 0190** or **getadvice@ecclesiastical.com**

Ecclesiastical
Financial Advisory Services

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PD2991 1 08/18