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## Financial matters



Your 50+ customer may raise general financial issues with you and need information on how to plan for the future. This section provides some suggestions you can make to help them take stock of their financial situation and plan ahead.

With increases in life expectancy, both men and women may expect to live a healthy 20 years beyond their retirement age so a financial evaluation in mid-life can pay dividends by identifying potential problems or providing reassurance that money is available to meet changing needs.

### [+ Taking stock](#)

Create a simple day to day budget to see where shortfalls or surpluses lie. Can anything be done now to remedy a shortfall?

### Remedying a shortfall

[Print/save page as a PDF](#)

### Useful links

[The Financial Conduct Authority](#) provides consumer Information on the financial products and services they use, how to avoid scams and how to make a complaint.

[Power of Attorney information](#)

[Turn2us](#) provides information for people in financial need on how to access funds through welfare benefits, charitable grants and other sources

- Debt management
- Reducing expenditure
  - shop around for utilities
  - best savings rates
  - best insurance
  - discounts aimed at the 50+ group.

- Finding employment
- Continuing to work and draw a pension
- Self-employment
- Sale of assets
- Income from hobbies
- Obtaining all benefits due
- Increasing savings if possible

### Identifying future hotspots

Where appropriate, consider [specialist financial advice](#).

#### Disclaimer

This site is for help and information only. It is not meant as an authoritative guide. It is not meant as an authoritative statement of the law, and future changes in the law and other programmes and initiatives could make it less accurate at times. TAEN, the Department for Work and Pensions and the European Social Fund take no responsibility for your use of the information. You should always take [professional advice](#) on any specific legal or financial matter.

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This website has been developed by TAEN - The Age and Employment Network in association with the European Social Fund and the Department for Work and Pensions



