

A close-up photograph of a person sitting in a wheelchair. The person's right arm is visible, wearing a sleeve with a military camouflage pattern. The wheelchair's large rear wheel and frame are in the foreground, slightly out of focus. The background is a blurred indoor setting with a person wearing a blue and white striped shirt.

**Free financial guidance  
for forces personnel  
and veterans**

**FORCES**  
MoneyPlan



Forces MoneyPlan offers Armed Forces personnel and Veterans a free and confidential consultation with a qualified financial adviser. The meeting is designed to help identify a recipient's financial needs, priorities and options, based on their personal circumstances.

All Forces MoneyPlan financial advisers are members of the Personal Finance Society, the leading professional body for personal finance professionals in the UK. The volunteer financial advisers have undergone bespoke training equipping them with the skills required when dealing with forces personnel and veterans.

# Why was Forces MoneyPlan created?

Forces MoneyPlan was created by The Personal Finance Society to provide serving personnel and veterans free and easy access to a qualified, professional financial adviser. This is part of the Society's 'Pro Bono' activity, aligned to its purpose in continuing to build public trust in the profession.

Generic financial guidance can provide advice for specific issues or overall financial wellbeing, helping the recipient to better plan their finances without the promotion of financial products or ongoing financial advice.

The meeting will seek to provide information, good practice and options that the recipient may wish to consider; all based on an understanding of their current circumstances and needs. Whilst there is no obligation or expectation to do so, there is also the option for recipients to continue their relationship with the adviser and receive regulated financial advice for a fee.

# 4 easy steps to access Forces MoneyPlan

1

Recipients first register their interest and any specific requirements via a simple online form.

2

The Personal Finance Society will match the recipient with a local financial adviser.

3

Referencing Forces MoneyPlan, the adviser will contact the recipient to collect basic information and to arrange a meeting; either face-to-face, via telephone or Skype.

4

Following the meeting, the adviser will complete a Financial Report outlining the guidance suggested and optional next steps for the recipient to consider. The report is confidential and sent directly to the recipient.

At point 4, the recipient can choose to continue the professional relationship if they are prepared to pay for regulated financial advice. However, there is no obligation for them to do so.

## Find out more

To find out how to access this service, as a member of the Armed Forces or a Veteran, or if you represent an organisation who may wish to refer Forces Moneyplan services, you can find out more by going to [forcesmoneyplan.org](https://forcesmoneyplan.org)



Personal  
Finance  
Society

Standards. Professionalism. Trust.

**“Forces MoneyPlan is a hugely valuable service that our members are finding of great help in both getting to grips and managing their finances, as well as protecting themselves from scams and fraud”**

Alistair McKay Forbes Managing Director,  
Armed forces charity On Course Foundation

**“Very useful. It went beyond our expectations. The adviser sat down with us and talked us through how we could achieve our aim of buying a house. It set our mind at ease in many areas and gave us confidence to move forward with our plan.”**

Forces MoneyPlan Recipient

**“The knowledge, experience and professional approach from the initial financial guidance adviser was much appreciated.”**

Forces MoneyPlan Recipient

**“The assistance was greatly appreciated and has put me now in the knowledge that my family and I will be well supported with my financial plan. Once again thank you, it was well received knowledge at an important time.”**

Armed Forces Veteran

**Forces MoneyPlan** is an initiative created and led by the Personal Finance Society, the leading professional body for personal finance professionals in the UK.

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