

wesleyan

MONEY THAT WORKS, FOR GPs.

Specialist advice for every life stage.

Proven in practice.

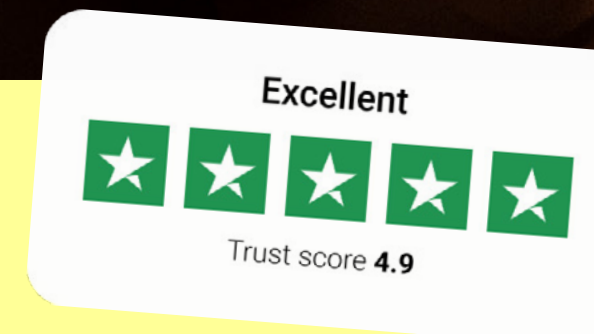


Exclusively for medics.

At Wesleyan Financial Services, we have a team of Specialist Financial Advisers who work exclusively with doctors. That's why we can make your money work harder for you.

GP approved.

96% of doctors rate our Specialist Financial Advisers as 'very good' or 'excellent' and our Trustpilot score is 4.9.



A trusted voice.

We partner with leading medical bodies, including the Royal College of General Practitioners (RCGP) and Royal College of Surgeons of Edinburgh (RCSEd).

The RCGP and RCSEd are introducer appointed representatives of Wesleyan Financial Services Limited.

Specialists in your field. Specialists in ours.

Your lifelong partner.

Our financial advice evolves with you – from income protection and investing your money to guidance on the NHS Pension Scheme and McCloud judgement.

A deeper understanding.

Explore our specialist online insights for medics, covering the implications of the NHS 10-Year Plan, regional variances and evolving partnership model.

NHS recognised.

We're formally recognised by the NHS to give guidance to members of the NHS Pension Scheme.

Working around you.

Our advice appointments fit around your busy schedule; meet us in person or virtually. Charges may apply.



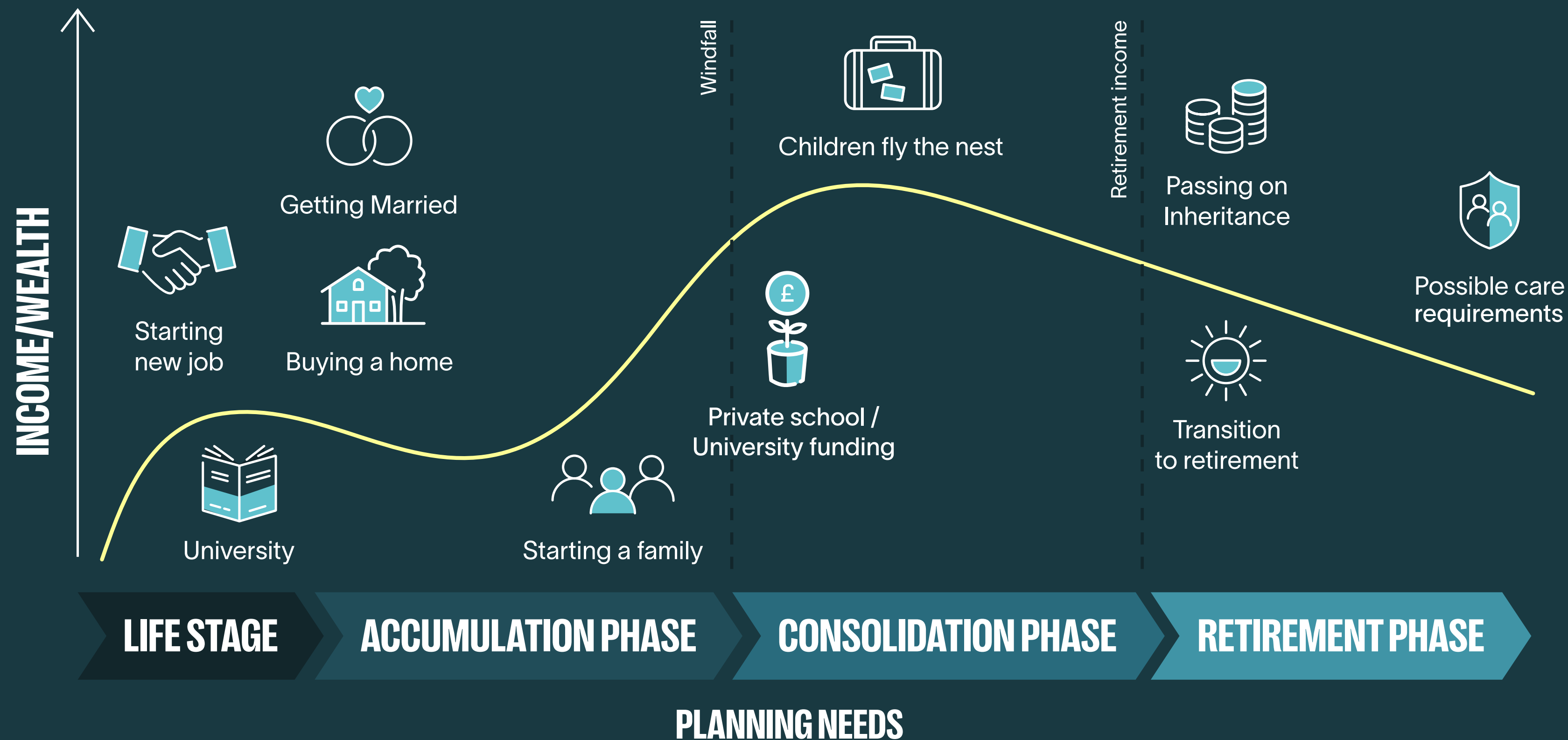
I have entrusted Wesleyan Financial Services for a number of years now due to having Ciaran Wilson as our Adviser. Ciaran is very knowledgeable regarding Primary Care finance. He looks after all 14 of the GPs here and ensures that we get the best from our insurance. I would be happy to recommend Ciaran and Wesleyan services to other practices and individuals."

— Nuala Lamont

For every stage of life.

As your life evolves, so do your financial priorities. Our Specialist Financial Advisers will help you get the most out of each life stage, from building your wealth to planning your dream retirement.

As your lifelong partner, we're here for the long haul. Supporting you through challenging times and helping you build a strong financial future.



Our financial advice evolves with you.

Our financial advice evolves with you – from guidance on income protection and investing your money to NHS Pension scheme and McCloud judgment.

Investing your way.

Unlock the full potential of your financial future – smoothed returns, a range of asset classes and risk levels you can choose. We'll even help you invest your limited company funds.

Covering every career path.

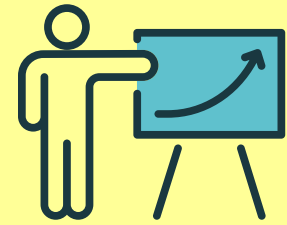
For NHS workers, GP partners and limited company owners. Talk to us about buying into a GP practice, managing budgets, partnership protection or succession planning.

Life after work

We can help you maximise your income for the years ahead and reduce your inheritance tax bill.

Tax treatment depends on your individual circumstances and may be subject to change in the future. Please remember the value of investments and any income can go down as well as up and you may get back less than you invest. Advice in relation to inheritance tax planning is not regulated by the Financial Conduct Authority.

Ways we make a difference.



Financial planning seminars.

Attend a free financial seminar at your local medical practice to get a Continuing Professional Development (CPD) certificate.



Mortgages for doctors.

We help doctors secure the right mortgage deal. Our advice covers short-term medical contracts to complex incomes.



Personalised pension report.

Are you on track for your dream retirement? Our personalised pension reports offer unmatched clarity and guidance.



Estate planning.

We help high-earning doctors leave more to loved ones – from savvy tax planning to passing on your medical business.



Private practice.

We're experts in maximising private earnings, optimising tax efficiency and planning exit strategies.



Retirement planning.

Bring your dream retirement to life with a fully tailored retirement income plan. Fund your post-work years, maximise your NHS pension benefits and plan your exit from private medical work.



NHS Pension Scheme.

Complicated scheme, straightforward planning. We'll help you make the most of your benefits and any lump sum, so you can retire on your own terms.

Always remember your mortgage is secured on your home. Your home may be repossessed if you do not keep up repayments on your mortgage. Wesleyan Financial Services provides broker and advice services, for which a fee may apply.

Financial solutions, designed for GPs.

Wesleyan Group understands your world, not just your wealth.
That's why solutions are tailored to the realities of your career.



Income protection.

Designed for medical careers, Wesleyan Assurance Society's income protection plan dovetails with the NHS sick pay, with 100% of claims made by GPs paid in 2025.



Locum Cover.

Wesleyan's Practice Protector Plus (PP+) covers the cost of hiring a locum or replacing key staff. 96% of claims were paid out to practices in 2025.



Tailored insurance.

Wesleyan members receive a 20% contribution towards insurance premiums across home, motor, travel and more. Terms and conditions apply.

Ready to get a financial health check?

Don't let your finances sit in the waiting room. Book an appointment with a Specialist Financial Adviser today to make your money work harder for you. Charges may apply.

Book now

Or call us on **0800 107 1438**

Opening hours: 9:00am–5:00pm, Monday–Friday.



Protection ▪ Investments ▪ Retirement

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For more information about the Wesleyan Group of companies, visit wesleyan.co.uk/ourcompanies

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