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In the video below, Eddie and Holly

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discuss the report's findings and the implications it has for both consumers and the financial advice industry. "For many, an ongoing service and the development of a relationship grounded on proactive, personalised financial advice can be just as important as being in the best-performing fund possible", concludes Grant.

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The value of financial advice | St. James's
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there are a range of organisations that can
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Understanding ‘advice’ and ‘guidance’
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MCMEEL AND VIRGO ON
FINANCIAL ADVICE AND
FINANCIAL PRODUCTS. Third Edition.

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Edited by Gerard McMeel and John Virgo.

Description. Now in hardback, this comprehensive work covers the legal and regulatory environment in which claims concerning sales of and advice on financial products for individuals and businesses are brought and defended.

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Citizens Advice Scotland offers advice on benefits, debt and money – find your nearest branch to make an appointment.

Financial Conduct Authority (FCA) regulates the financial services industry in the UK. If you use a financial adviser you can check the FCA register to make sure the firm you're dealing with is regulated.

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There's also information about financial products, possible scams and how you can protect your money on their website and through their consumer helpline (0800 111 6768).

Getting free financial help and information

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Put the facts down in a sensible order.

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A qualified financial adviser will talk you through your investment options over the phone Use your computer, laptop, tablet or mobile phone to view the adviser's screen and see each step of the process No forms to fill in - if you want to proceed, we'll take care of everything for you

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As well as protection advice, we also offer a range of investment advice options to help you to make your money work harder. See our advice option page for more details. Alternatively, for help and information about all money matters, you can go to moneyadvice.service.org.uk.

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Financial Protection - Protection Advice |
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Financial services or products ... The
Money Advice Service has information on
making complaints and time limits for
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Complain about a financial service or product - GOV.UK

There are two types of financial advice you can get, independent or restricted. Independent financial advisers (IFAs) If an adviser is 'independent' or a firm

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advertises that it gives 'independent advice' this means that it's able to advise and sell products from any provider right across the market.

This comprehensive guide covers the legal

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and regulatory environment in which claims arising in the financial services context are brought and defended. With (approximately) two annual updates this loose-leaf is an invaluable source of reference to those in the field of financial services.

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Financial Behavior: Players, Services, Products, and Markets provides a synthesis of the theoretical and empirical literature on the financial behavior of major stakeholders, financial services, investment products, and financial markets. The book offers a different way of looking at financial and emotional well-

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practitioners so readers can gain an in-depth understanding about this topic from experts from around the world. In today's financial setting, the discipline of behavioral finance is an ever-changing area that continues to evolve at a rapid pace. This book takes readers through the core topics and issues as well as the latest

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Worrying over the fancy words you see in contracts for financial products and services. By learning how to manage your money, you'll be equipping yourself with strategies that allow you to escape financial difficulties.

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The one book your bank Really does not want you to read. More than ever before, Canadians are frightened and stressed out about their retirement and financial future. With the mortgage, car payments and credit card bills, there never seems to be enough to pay the current bills let alone

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Advisor, Harvard University, and author
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personal finance: Money, earning, spending, saving, and investing. In thinking about these topics, you will begin to understand how your beliefs shape your financial behaviors for better or worse. This book is the foundation for all the information and discussion contained in the remaining four books on personal

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years I have educated and informed readers of TypeZFinance.com on personal finance topics with the goal of enabling readers to manage their finances intelligently without the assistance of a financial adviser. That's right, I am a financial adviser (actually I call myself a Financial Coach) encouraging people to

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fire their financial adviser! For decades I have been researching financial products and services offered to individuals. During that time I concluded that virtually all of the offers from financial advisers are grossly overpriced compared to do-it-yourself options available to those investors willing to make a modest time

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investment understanding personal finance. I've met advisers who have stated "I've never met anyone that doesn't need more life insurance". I've met advisers who recommend widely discredited investments that underperform and have expenses 10x as large as the do-it-yourself options. I've met advisers who hide from

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their clients the fact that they are being paid to recommend financial products. I'VE HAD ENOUGH and I want to help free investors from predatory financial advisers. The second book is titled Starting to Make Money. The goal of this book is to get you thinking about everyday money issues that everyone faces. I talk about car

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Loans, everyday spending and saving decisions and money issues affecting your social life. This book takes the personal finance foundation developed in book one and applies it to the real world. After reading this book you'll be comfortable effectively managing your personal budget. You'll be generating positive cash

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flow in your life and will be starting down a path that will lead to traditional investing and wealth building. The third book is titled *An Adult Relationship with Money*. This book is where most personal finance books start. To me, starting with this book is kind of like starting to build a house on the third floor. There's no way you can be

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successful in managing your taxes, investments, loans, and financial advisers until you have the foundation contained in the first two books. This is the book most similar to traditional personal finance books. The fourth book is titled Now You Have Money. This book discusses financial issues and decisions you'll face if

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You follow the guidance in the first three books. It discusses retirement investing, annuities, and other issues related to managing a six or seven figure net worth. If you're not in that wealth category yet, you will be soon enough. Just follow the guidance from the first three books. It's great to be ahead of the game and have the

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piece of mind knowing how to handle your future wealth before you actually have it. The fifth and final book is titled Extra Credit - Money for Fun. This book is the final step of the personal finance journey. Among other things it discusses personal finance issues around being set for life and keeping yourself educated

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about personal finance. If you're not set for life yet, don't fret. Just follow the guidance in the first four books and be patient.

**NEVER MAKE AN UNINFORMED
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This comprehensive book offers a rigorous analysis of the legal debates, approaches

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and practice-related issues surrounding financial advice and investor protection. Despite widespread recognition of the importance of financial inclusion more broadly construed, recent financial crises have highlighted deficits in retail investor protection - this book informs the development of robust yet adaptable

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frameworks to protect investors, including effective enforcement and dispute resolution. Divided into three thematic parts, Financial Advice and Investor Protection begins with a holistic discussion of the subject, including an examination of the impact of relatively recent technical innovations such as robo-

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advice. The second part evaluates the role of private law in achieving investor protection, considering in particular how tort law, contract law and equity allocate risk and liability for investment advice. Finally, the book outlines the investor protection frameworks in the jurisdictions of six significant financial centres. This

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Book will be a crucial read for various stakeholders in the investor protection debate including practitioners advising clients who work in this field, particularly across several of the jurisdictions covered, as well as policymakers interested in the development of law and regulation in this area. Scholars and students of financial

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Law will also benefit from its comprehensive and critical treatment of the subject.

Financial services are an ever increasing part of the infrastructure of everyday life. From banking to credit, insurance to investment and mortgages to advice, we

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Moreover, the way we consume them is changing with the growing dominance of fintech and Big Data. Yet, the part of financial services that we engage with as consumers is just the tip of a vast network of markets, institutions and regulators –

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swings the perspective towards the end-user, the customer, the essential but often overlooked participant without whom retail financial services markets would not exist. While still introducing all the key areas of financial services, it explores how the sector serves or sometimes fails to serve consumers, why consumers need

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protection in some areas and what form that protection takes, and how consumers can best navigate the risks and uncertainties that are inherent in financial products and services. For consumers, a greater understanding of how the financial system works is a prerequisite of ensuring that the system works for their benefit. For

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students of financial services – those aspiring to or those already working in the sector – understanding the consumer perspective is an essential part of becoming an effective, holistically informed and ethical member of the financial services community. A Practical Guide to Financial Services: Knowledge,

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Opportunities and Inclusion will equip you for both these roles. The editors and authors of *A Practical Guide to Financial Services: Knowledge, Opportunities and Inclusion* combine a wealth of financial services, educational and consumer-oriented practitioner experience.

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