

# Caring for your wellbeing

## Here at Rowan Dartington we really care

... about your health and wellbeing and how these can affect your emotional and financial resilience. We recognise that all aspects of life's ups and downs can affect you and your loved ones, and we want to support you every step of the way.

We want to achieve the best possible outcome for you so it's important for you to tell us if there is anything going on which affects your health or wellbeing.

Speak to your Investment Manager if there are any needs or circumstances which we need to be aware of, for example, if you or someone close to you could answer yes to having any of the following:

- ◆ Physical disability
- ◆ Severe or long-term illness
- ◆ Hearing or visual impairment
- ◆ Mental health condition or disability
- ◆ Addiction
- ◆ Cognitive disability or difficulty understanding
- ◆ Learning difficulties
- ◆ Recent or Impending retirement
- ◆ Recent bereavement
- ◆ Recent relationship breakdown
- ◆ Experienced domestic abuse (Including economic control)
- ◆ Caring responsibilities
- ◆ Limited digital skills/numerical skills/English Language skills
- ◆ Low confidence or knowledge in managing your finances
- ◆ Little or no help or support
- ◆ Worries about debt, lack of savings or any other worries
- ◆ Need to receive communications in a different format

We will work with you to ensure support is tailored to your needs and circumstances. Whether that be simply taking extra time with you to ensure you are comfortable with everything, to recommending having a third-party present to support you further or signposting you to further support for your wellbeing. Making sure we know about these circumstances will help ensure that you receive the best possible advice and outcomes for the long term.

Please also let us know if anything changes, this extends to later in life too – helping your attorneys and executors to navigate complex legal and care situations and look after your interests, even if you can't.

We will be there for you every step of the way.