

CASE STUDY



Money needed to enjoy a rich, and fulfilling retirement and take care of any of life's little surprises.

Ann's story.

Ann is 74 years old and retired. She has always worked hard and was making the most of her retirement, travelling around Europe and pursuing her hobbies until she unexpectedly required some medical treatment.



After a long and happy career as a musician Ann, was fully embracing her retirement.

She often visited friends and enjoyed several holidays each year, taking in the rich culture and history Europe has to offer.

Having always been fit and active, discovering she needed some healthcare and time in hospital came as quite a shock. This was only made worse when she heard that the NHS waiting list would mean she wouldn't be treated for at least another 12 months.

Lifetime mortgage required

£10,000 against her property, a Cotswold's cottage worth £250,000. plus a reserve account of £20,000

What were the benefits?

The most important benefit was to know that she had funds available to cover not only her present financial commitments, but also to meet any unexpected costs and emergencies, such as house repairs & improvements, and healthcare.

How did the money help?

The money enabled Ann to pay for private healthcare rather than waiting for the NHS and to continue enjoying the standard of living she had been used to, including travel and cultural pursuits and interests.

"Karen was clear and as simple as possible in her explanations, and extremely patient, as often I needed several repetitions of the information. Karen was entirely open and honest, and invariably cheerful and friendly, inspiring in me the confidence to complete the procedure."

Call to book an appointment

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