

Financial Health Check

You can book a telephone discussion with an experienced Financial Fitness Trainer to go through a quick and easy Financial Health Check.

The initial 30 minute call will allow you to explore all aspects of your finances and ask any questions you may have.*

A Financial Health Check can be beneficial at any life stage, and aims to aid you in reaching your financial goals.

This complimentary service is available regardless of where you bank personally.

To book a Financial Health Check please email health-check@hsbc.com



*After the initial discovery meeting further appointments with relevant HSBC UK staff members can be booked on request.
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Topics can include:

- ◆ First time buyer mortgage process
- ◆ First time buyer schemes
- ◆ Budgeting
- ◆ Savings
- ◆ Homeowner (e.g. re-mortgage, moving, home improvements)
- ◆ Pensions basics (non-advised)
- ◆ Borrowing
- ◆ Credit history
- ◆ Protection
- ◆ Information on investment options (non-advised)