



Official partners of
scottishathletics



TruWealth[®]
CASH4CLUBS



TRU WEALTH

CASH4CLUBS INITIATIVE



WELCOME

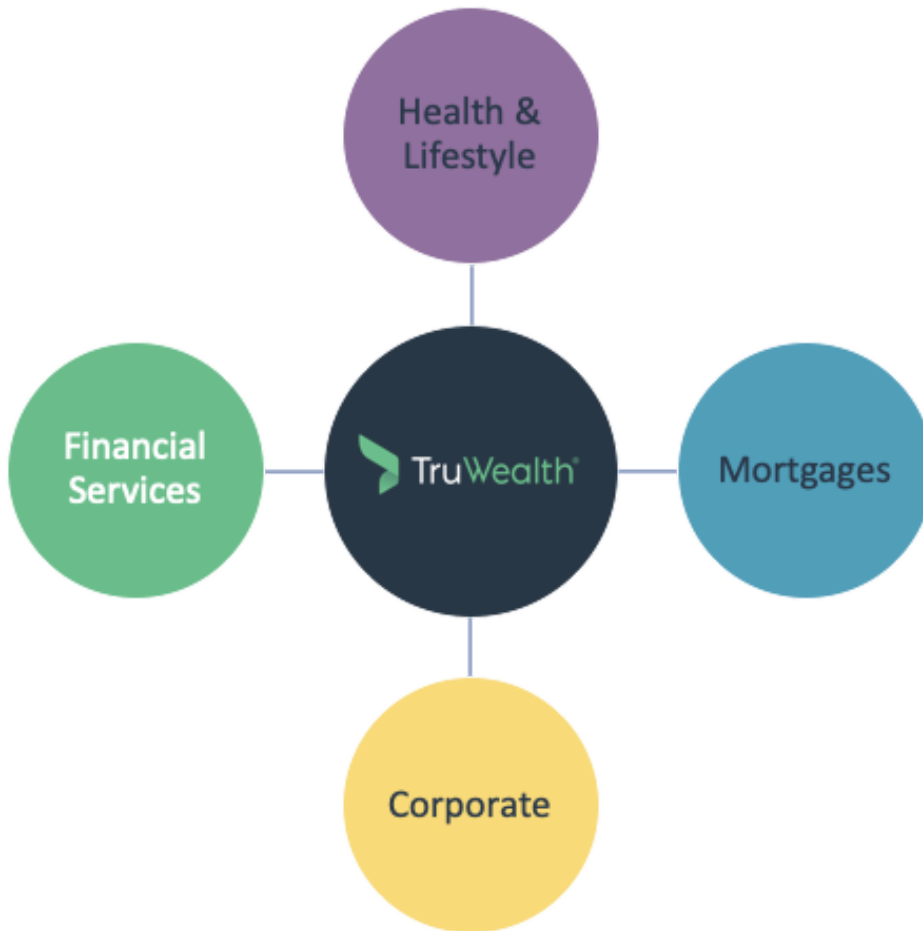
In addition to our sponsorship of the Tru Wealth Road Race Series and individual athletes, Tru Wealth are delighted to launch our new Cash4Clubs initiative. Cash4Clubs is a funding scheme giving athletics clubs and groups the chance to earn cash back for their clubs to improve facilities, purchase new equipment, gain coaching qualifications, and invest in the sustainability of their club.

OBJECTIVE

Referrals are the life blood of any business. We are looking to work with a select group of clubs and organisations to spread the word about the modern, accessible and professional financial services provided by the forward-thinking team at Tru Wealth.

As a reward for any business successfully referred to Tru Wealth, we would make a payment to your club. We hope that this would help with any resources needed for your club/organisation.

SERVICES WE OFFER



Financial Planning

Tru Wealth works with individuals and organisations, providing expert advice on everything from Pensions and Investments to Tax Planning and Business Services. We focus on developing long lasting client relationships that allow us to create realistic financial plans that always align with your aspirations yet can adapt quickly to changes in circumstances.

Mortgage Advice

Independent and whole of market mortgage advice. Our expert advisers search mortgage deals across the entire market to find you the best deal. We deal with everything from First Time Buyers, Home Movers, Re-Mortgages and complex Buy To Let transactions.

Health & Lifestyle

Award winning life insurance, income protection, critical illness cover and private medical insurance in association with Vitality UK. Protect yourself and your family whilst being rewarded for living a healthy and active lifestyle.

Corporate

The financial goals you set for your business will differ from your personal financial ambitions. However, planning remains the key to achieving those targets. From small businesses to large corporations, Tru Wealth can help take some of the pressure off.



WHY TRU WEALTH?

Everything under one roof

As a Financial Services business, not only can we take care of your protection needs but we can also assist with your mortgage, pension, investment and general financial needs! Making financial planning as seamless as possible for you.

Product experts

Our Financial Advisers are experts in the Vitality programme and products – we make a recommendation Only after we've taken the time to fully understand yours and your clients personal circumstances.

Customer engagement

We have a team that is dedicated to helping you unlock your rewards and make the most of your Vitality product. Meaning you save money and engage in a healthier lifestyle.

Cash4Clubs

By doing business with us, not only can you be sure you will be receiving good quality advice from our professional advisers, you will be raising money for your club. After every successful transaction, we will provide £100 cash back to your chosen club.



HOW IT WORKS

Step 1: Share our services with members of your club/organisation

This can be done via your website, social media groups, advertising within the club or word of mouth

Step 2: Members contact Tru Wealth

Your members then contact us, letting us know that they are a member of your club and explain what they would like assistance with.

Step 3: Initial consultation

Once we have received an enquiry from your member, we contact them to arrange an initial consultation or phone call to establish how we can be of assistance. This initial consultation is always at our expense.

Step 4: Club is paid

For each member who completes an eligible transaction with Tru Wealth, we will give cash back of up to £100 to your club. This will be paid within 3 months of the transaction and is valid per member, not per service provided.

Full Terms and conditions can be found here: <https://bit.ly/2RIW2hq>



EXAMPLE:

1

Member contacts Tru Wealth to set up or review life insurance policy. Tru Wealth advises the member on their options and sets this up for the member. The member is happy and begins paying a monthly premium to the insurance provider. **Tru Wealth pay a sum of £100 to the member's club after the policy has been successfully running for 3 months.**

2

Member contacts Tru Wealth to buy their first home. Tru Wealth search the market and finds them the most competitive deal. Once the mortgage has successfully completed and the funds have been released to the members solicitor to facilitate the purchase of their home, **Tru Wealth pays a sum of £100 to the members club.**



GET IN TOUCH

To ask any questions or find out more information about this scheme and how it can be shared with your members, please get in touch.

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Terms and Conditions

