

Response to Request for Information

Reference FOI 031625
Date 4 March 2016

Facilitating Access to Financial Information and Advice

Request:

- 1) Are your staff and any other information and advice providers used by you able to:
 - Identify people who may benefit from taking regulated financial advice
No but this will be addressed by the proposed appointment of a Finance Support Officer in Financial Assessments
 - Describe the benefits of taking regulated financial advice
Only in basic terms, in relation to Deferred Payment recipients.
- 2) Have you provided training to enable this? If so please state the method/s used
Council staff do not provide regulated financial advice
- 3) How do you 'facilitate access' to regulated financial advice when appropriate?
*Through SOLLA, link provided below:
<http://societyoflaterlifeadvisers.co.uk/>

Through Age UK, link provided below:
<http://www.ageuk.org.uk/>*
- 4) Do you have a specific financial advice pathway for self-funders?
Through referral to the organisations listed in (3) above
- 5) How do you quality assure financial information and advice provided by your staff and/or any external providers?
Staff do not provide financial advice. Information relating to the Financial Assessments process is provided and information and advice in relation to social security benefits is provided by the Council's Welfare Rights Service. Where information and advice is provided as stated, quality is assured by peer challenge, training and supervision.