

Life After Settlement Meeting



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Life After Settlement

Reaching a settlement can feel like a huge milestone — and in many ways it is. After months or even years of litigation, appointments, reports and uncertainty, the conclusion of a claim often brings a sense of relief.

But it can also bring new emotions and new questions.

For many people, the period after settlement is a significant transition. The focus begins to shift away from the legal process and towards the future — thinking about what life looks like now, what support is needed long term, and how to make sure the compensation received provides lasting security.

It is completely normal to feel uncertain, overwhelmed or even a little lost at this stage. You may have many questions, and it can take time to adjust to a new chapter.

That is where we come in.

At Paladin, we are here to support you through life after settlement — helping you understand the financial decisions ahead, putting clear plans in place, and removing as much worry and complexity as possible. With the right guidance, your settlement can become the foundation for greater stability, independence and peace of mind.

Most importantly, you do not have to navigate this alone. We will take the time to get to know you, understand what matters most, and help you move forward with confidence.



Why Paladin?

At Paladin Advice we specialise in supporting those who have received serious injury compensation across the UK, including Scotland. We promise to put your needs above our own.

Truly Independent Advice

We are not financially tied to any investment company, allowing us to provide advice that is focused solely on what is right for you and your circumstances.

Trusted By Solicitors and Barristers

The majority of our work is referred to us by solicitors and barristers who trust us to support their clients with care, professionalism, and integrity.

Specialist Experience

Our work is shaped by decades of professional experience supporting individuals following personal injury and clinical negligence settlements.

Alongside this, our team brings a genuine understanding of the impact that life-changing events and disability can have on individuals and families. This helps us approach our advice with empathy, care and a clear focus on what truly matters to you.

How We Work

We adapt how we work to suit you. Meetings can take place in person or remotely, and you are welcome to have a family member, solicitor, or other professional involved if helpful.

Supporting You and Those Around You

We work alongside deputies, professional trustees, solicitors, case managers, and other professionals, as well as family members.

Accessibility

We take care to communicate clearly and in a way that works best for you.

Information and correspondence can be provided in alternative formats where needed, and we are always happy to make reasonable adjustments to ensure you feel comfortable and supported.

Our Financial Planning Team

At Paladin, our financial planning team is made up of three highly qualified Chartered Financial Planners, with many decades of combined experience supporting clients after serious injury and clinical negligence settlements.



Ian MacKendrick
FPFS APFS LLAA



Stephen Farnfield
APFS



Liam Harvey
APFS

Professionally and personally, we understand the challenges faced by individuals living with injury, poor health, or vulnerability. That understanding shapes everything we do. We take a compassionate, caring approach, taking the time to truly get to know each client, their family, and their needs, so we can provide advice and long-term support that is completely tailored to their circumstances.

Whether you are working with Ian, Steve or Liam, you can expect the same consistently high level of guidance, care and expertise. Our role goes far beyond investment management. Working closely with the wider Paladin team, we provide full financial planning support — including ensuring clients receive all state benefits they are entitled to, as well as accountancy guidance to make sure tax is declared and paid correctly. Above all, we are here to carefully support you into life after settlement, removing as much financial worry and complexity as possible so you can focus on living your life.



Our Services

Holistic Financial Planning

Our holistic financial planning service helps you understand your overall financial position following settlement and plan with confidence for the future.

We take the time to understand your circumstances, priorities, and concerns, and bring everything together into a clear, structured plan that supports both your immediate needs and long-term security.

Trusts

We provide advice and support in relation to the suitability of setting up a personal injury trust to help protect your damages award.

Where appropriate, we can help set up the trust and associated bank account, with ongoing guidance to ensure it continues to meet your needs over time.

Investment Advice and Management

We provide truly independent investment advice to our clients. We are not financially connected to any investment provider so we can provide advice that is focused only on what is best for you and your needs.

Welfare Benefits

We help you understand which welfare benefits you may be entitled to.

Our team looks at your individual circumstances, as well as those of your wider family where relevant, to ensure you receive the support available to you and understand how benefits fit alongside your settlement.

Tax and Accountancy Support

We work alongside trusted accountancy firms to provide tax and accountancy support where required. This helps ensure you meet your tax obligations correctly, while avoiding paying more tax than is necessary, and gives you confidence that everything is handled appropriately.

What Happens Next?

Reaching a settlement can bring relief, but it often raises new questions about what comes next. At this stage, many people want clarity, reassurance, and support to help them move forward with confidence. We offer a free meeting with one of our experts and will discuss your plans for the future and help you look forward.

What to Expect



A **clearer understanding** of your financial position



Guidance on which decisions are **priorities**



An **overview of the options** available to you



Straight-forward guidance delivered clearly, at your own pace



Clarity around areas such as trusts, welfare benefits as well as cash and investment planning

Some of the key areas we will cover in the meeting are:

1. Budgeting

2. Cash Management

3. Wills & Lasting Power of Attorney

4. Welfare Benefits

5. Tax

6. Investments

7. Property Ownership

8. Personal Injury Trust

9. Financial Risks

Arrange a Discussion With Us

Our initial meeting is an opportunity to talk through your situation in a calm and supportive environment. There is no obligation to proceed, and no pressure to make decisions.



Meetings can take place in person, by phone, or via video call — whichever you are most comfortable with.

Get in Touch

To arrange a meeting, please contact:

- Email: enquiries@paladinadvice.com
- Telephone Number: +44 (0)1227 937 793

We can agree a suitable date, time, and format for the discussion.

You are welcome to have a family member, deputy, solicitor, or other professional involved if you wish.

Scan to arrange an initial conversation





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W: paladinadvice.com