

CASE STUDY



Equity release has helped us buy our dream bungalow and to enjoy a happy, stress free retirement.

Mike and Sheila's story.

Mike and Sheila are 68 and 67 respectively and both retired. They have four grandchildren with another on the way. Having always been a close family, they love being grandparents and enjoy spending time with their grandchildren whenever they can.



Mike and Sheila had always dreamed of moving to a bungalow, with a lovely big garden to enjoy in their later years.

Their current home was starting to become a burden, with upkeep and renovations becoming a real drain on their resources.

Sheila was also really beginning to struggle with climbing the stairs, so moving to a new bungalow seemed the perfect solution.

Lifetime mortgage required

Mike and Sheila wanted to purchase their new bungalow, but without earning an income they didn't realise purchasing a new home at this time in their lives was an option.

How did Equity Release benefit you?

We have been able to move into our dream home, a bungalow just around the corner from our children and grandchildren.

What did the money enable you to do?

We could purchase a new home, even after retirement. Now we are living in our dream home and enjoying some quality time with our growing family.

"We would definitely recommend Karen for Equity Release advice. We liked the fact that she gave us lots of time and did not rush us into anything. We felt she really knew her stuff and gave us some great advice."

Call to book an appointment

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Member of The Equity
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