



Dune Financial

Providing specialist Independent Financial
Advice to recipients of Clinical Negligence
and Personal Injury Settlements.

Pre-Settlement Advice

Dune Financial Planning Ltd provide pre-settlement advice to the claimant's legal team on the complex aspects involved with negotiating and accepting a settlement.

We specialise in the following services:



- Periodical payment reports (analysing the structure of legal settlements at a preliminary stage and for court approval hearings)
- Ensuring appropriate indexation is applied for periodical payments
- Attendance at settlement meetings
- Expert witness services on quantum
- Infant settlement and analysis reports for the court, comparing Court Funds Office investments with an alternative investment strategy
- Welfare benefits assessment

We have assisted many claimants and their legal teams on the appropriate way to structure the settlement to meet both short term and long term financial needs.

Post-Settlement Advice

Dune Financial Planning Ltd have a strong history and breadth of experience in providing financial planning advice to recipients of legal settlements together with their trustees or deputy.



Many claimants will not have the option to return to work and it is therefore imperative that the settlement is well managed and a suitable financial strategy is implemented to secure their future.

Our holistic financial planning service includes:

- The effective use of Personal Injury Trusts, if the recipient is in receipt of means-tested welfare benefits or may require state support in the future
- Providing support to deputies on Court of Protection cases and trustees of Personal Injury Trusts
- Recommending and implementing a suitable financial strategy
- Support preparing and reviewing the annual expenditure budgets
- Cashflow modelling income and expenditure needs
- Managing the medium to long term investment portfolio
- Welfare benefits assessment
- Workplace pension advice and support when directly employing carers

Dune Financial Planning Ltd

The advisers at Dune Financial Planning have many years of experience working with recipients of legal settlements, trustees and deputies.

The recommendations and service we provide is always centred around acting in the clients' best interests.

