Wealth Management Process

Your Situation

- No plan
- Conflicting goals
- Disorganised
- Too little time
- Too much tax
- Too much cost
- Too much risk
- Needless complexity
- Uncertain future
- Family at risk
- Little confidence
- No clear vision
- Who to trust?

Discovery Meeting

- ✓ Discuss your current situation
- ✓ Discover your goals, values and objectives
- ✓ Evaluate your attitude to risk and capacity
- ✓ Demonstrate our lifetime cashflow
- ✓ Determine the value we can bring to help you

Recommendation Meeting

- ✓ Discuss how our plan of action will meet your goals and objectives
- ✓ Demonstrate this through the presentation of your personal lifetime cashflow
- ✓ Present our recommendations and complete any initial paperwork
- ✓ Answer any questions that you may have

Review Meetings

- ✓ Update essential financial data
- ✓ Re-run Lifetime Cashflow
- ✓ Review how your objectives are being met

The Outcomes

- Defined Plan
- Defined goals
- Organised
- More free time
- Less tax
- Lower costs
- Reduced risk
- Simplified
- Peace of mind
- Family protected
- Confidence
- Vision
- Trusted adviser

Information Gathering & Transitioning Assets

- ✓ Collect all relevant data concerning your financial arrangements
- ✓ Undertake research and analysis
- ✓ Prepare Financial Plan
- ✓ Prepare Lifetime Cashflow
- ✓ Prepare and complete all relevant paperwork
- ✓ Manage asset transition process

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CHARTERED FINANCIAL PLANNERS