







Financial Planning

					
About Us	All About You	The analysis	The Solutions	Implementation	The Review
<p>During this phase, we:</p> <ul style="list-style-type: none"> • Meet you • Agree confidentiality • Explain our value proposition • Discuss how we deliver our offering to you • Answer your questions • Agree to proceed. 	<p>During this phase, we:</p> <ul style="list-style-type: none"> • Get to know what's really important to you • Listen as you explain your goals, dreams and aspirations • Establish where you want to be, ultimately, and where you are today. 	<p>During this phase, we:</p> <ul style="list-style-type: none"> • Make sure that we fully understand your requirements in terms of your goals • Obtain all the relevant facts and figures that make up your current financial situation • Consider what's needed to get you where you want to be. 	<p>During this phase, we:</p> <ul style="list-style-type: none"> • Consider the alternative solutions that will help you get to where you wish to be • Consider the risks and costs that may be associated with any of these solutions • Present the solutions to you. 	<p>During this phase, we:</p> <ul style="list-style-type: none"> • Provide you with the information necessary for you to make the right decisions • Make sure that you understand the cost and risk implications of your decisions • Implement your decisions. 	<p>During this phase, we:</p> <ul style="list-style-type: none"> • Review your situation • Review your financial plan to ensure that it will continue to support and achieve your financial goals • Implement any adjustments necessary to ensure that your plan continues to deliver on your goals.
<p>Outcome:</p> <p>We complete a Commitment and Confidentiality Agreement in which we jointly agree to proceed with the business relationship.</p>	<p>Outcome:</p> <p>We complete a Client Questionnaire that collects:</p> <ul style="list-style-type: none"> • A clear view of your prioritised goals and aspirations • Details of your current assets and liabilities • Insight into your current financial budget. 	<p>Outcome:</p> <p>A Personal Needs Analysis that:</p> <ul style="list-style-type: none"> • Compares where you are with where you wish to be • Provides a gap analysis highlighting any potential shortfalls in getting you where you wish to be. 	<p>Outcome:</p> <p>A Personal Financial Plan that:</p> <ul style="list-style-type: none"> • Maps the immediate and future actions required to help you achieve your stated goals and objectives • Outlines our ongoing service to help you achieve your goals. 	<p>Outcome:</p> <p>We will implement and administer your Financial Plan inclusive of:</p> <ul style="list-style-type: none"> • Submitting all administrative paperwork • Ensuring administration of all steps in our Service agreements. 	<p>Outcome:</p> <p>Through regular contact we will:</p> <ul style="list-style-type: none"> • Proactively act as your Financial Conscience • Help you manage your financial circumstances • Ensure that your financial plan continues to work towards your goals.

How we help you achieve financial independence