

The 7 Step Financial Planning Process

Arrange an Initial Appointment

Familiarisation

Prior to the appointment we will send you an email and ask you to complete a Lifestyle Questionnaire which will gather the information we need to ensure our initial appointment is as productive as possible.

Initial Discovery Meeting

This appointment will provide an opportunity to find out more about you and your aspirations and to demonstrate how we may be able to help you achieve your financial objectives.

Information Gathering and Analysis

If you are happy to proceed to the next stage, we will compile an accurate picture of 'where you are now' in relation to where you want to be, including any research necessary to complete our recommendations to you.

Advice and Recommendation

Typically, a further meeting will be arranged where we will present your Financial Plan outlining our specific recommendations and advice.

Policy Arrangement and Implementation

Following the Advice and Recommendation Meeting we will ensure that all agreed actions are managed efficiently to completion and will keep you informed of our progress. We will be available to answer any questions you may have and will confirm when all actions are complete.

Ongoing Service and Review

Together we will agree the most appropriate timing for your Financial Review which will be another interactive session where you will play an active part in reviewing agreed objectives and actions, progress to date and sharing any new or future financial aspirations with us.

Information in this document is valid for tax year 2023/24