Our financial advice process

Initial meeting

- We listen and understand in a confidential environment.
- We display your current position using a one page interactive summary.
- We explain how we can add value.

Develop strategy

- We research and test possible strategies.
- We have team meetings to share strategy knowledge.
- We refine a strategy for you.
- We document the strategy benefits, risks and costs.

Refine strategy

- We allow you plenty of time to consider the strategy.
- We adjust the strategy to suit.
- You may want to meet again.
- You decide to proceed.
- We enter into a long term partnership with you.

Present strategy

- We present the written strategy and ask for your feedback.
- All costs are explained.
- You decide to proceed.
- We enter into a long term partnership with you.

Implement strategy

- You approve implementation.
- We implement your strategy for you.
- We complete all forms and paperwork.
- We double check the strategy is implemented as you wish.

Ongoing review

- We review your situation on an ongoing basis.
- We help guide you to avoid mistakes that can destroy wealth.
- We are always here to help (e.g. insurance claims, life changes)



We help you to live the life you want.