

Pre-engagement

Consultation

Introduction and agree how we will work together.

Stage 1 Your goals

We establish your life goals, personal circumstances, aspirations and concerns for your family.

Stage 6

We'll meet on an ongoing basis to review your plan and make any necessary changes.

Regular reviews

Stage 2 Your information

We collect and assess all relevant personal and financial data and establish your perceived risks.

The process we follow

Stage 5 Implementation

We agree what we need to do to help you achieve your objectives over a given period of time.

Stage 4

Design your plan

Having completed our analysis, we will prepare a personal report and recommendations, then set out a range of different options which can be used to get you where you want to be.

Stage 3 Analysis

We thoroughly investigate your current financial position and how you arrived there.