



WHY IMPLEMENT A FINANCIAL PLAN?

Traditionally the approach to financial planning has been piecemeal where financial needs are considered individually such as pension, investment, life assurance, income protection, inheritance planning etc.

A holistic approach is one where all these needs are considered and analysed now and in to the future as part of a single exercise. This is a very powerful way to help you visualise the future and to form and implement an overarching financial plan. This plan is then reviewed at agreed regular intervals to ensure you are keeping on track.

Financial planning is important because it gives you the framework to help you achieve your life goals and financial objectives as you and your family move through different stages in life. In a nutshell financial planning gives you knowledge, control and peace of mind about your financial future.

FINANCIAL PLANNING SERVICE

A solid Financial Plan empowers you to:

Plan for your future

- Making sure you have sufficient funds to last during retirement.
- Handling the inheritance of your Estate in a tax efficient manner.
- Preparing for a marriage (or a divorce).
- Facing a financial crisis such as a serious illness or job loss.
- Coping financially with the death of a spouse or close family member.
- Buying or selling a family business or other significant asset.
- Planning a house move.
- Upgrading your car.
- World Travel.

Plan for your family

- Planning for the birth or adoption of a child.
- Passing on a family business.
- Tax efficient Estate Planning.
- Funding your children's education.

Contingency Planning

The future is uncertain and it is difficult to imagine how you or your family could handle unexpected events, such as a death or an illness. A financial planner can help you analyse potential events and protect your finances.

*"Our goals can only be reached
through a vehicle of a plan,
in which we must fervently
believe, and upon which
we must vigorously act."*

Pablo Picasso

Process

At the outset we will meet with you to explain the process in more detail. We will outline our responsibilities and what you need to do to ensure our engagement is successful. We will also explain our pricing, what we should achieve and what you will receive from us at the end of the process.

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