

Plan : Protect : Perform

The Advice Process

- A thorough evaluation of your circumstances, objectives and preferences – which can encompass both business and personal issues.
- The obtaining of current information on all of your existing policies and arrangements in order to build this into your financial plan.
- A careful analysis of your needs with a view to tailoring recommendations so that they precisely match your circumstances.
- Comprehensive research on the open-market to identify the best possible ‘fit’ – allowing us to compare your present provisions, as well as make recommendations for future planning.
- Clear and comprehensive documentation supporting any recommendations.
- The provision of all documentation required to amend existing arrangements, or set up new ones.
- Time spent together discussing matters arising and completing documentation
- Submission of all application forms, on your behalf, to the relevant insurers or investment providers. Error-checking and monitoring of progress. Forwarding to you all completed documentation.
- Regular reviews
- Ongoing advice in relation to ‘live’ issues or adapting provisions to fit changing circumstances.