

Financial Planning - 10 Point Financial Health Check

1. Your Issues

- An update from you on issues you feel require attention

2. Strategic Review

- An update from us on recommended changes to your financial planning strategy

3. Investment Review

- Looking back on the last 12 months performance

4. Investment Action Plan

- Looking forward & implementing any changes to your investment strategy

5. Taxation Update

- Reviewing Opportunities & Threats created by changes to Taxation Law

6. Pensions Update

- Reviewing Opportunities & Threats created by changes to Pension Law

7. Insurance Review

- Providing a check of current levels of cover & policy wording

8. Estate Planning Review

- Do you have an Inheritance Tax issue, what planning is required

9. Removing the hassle

- Sorting through any paperwork received that confuses you

10. Professional Update

- Providing professional updates to your Accountant & other professional advisers, if needed