

# Demystifying the Process

Providing you with financial security, reward for all your hard work and safeguards to protect your interests.

## 1

### GETTING TO KNOW YOU

It's all about you! Taking the first step involves understanding you and what you want from life. At the end of step one, we will be able to determine if we are the right fit for a mutually rewarding relationship.

#### *What's involved?*

##### **1. Getting prepared:**

To make the most of our time together, there are a few things we need you to complete:

- Complete a short on-line financial health check
- Answer some thought provoking questions
- Provide basic information about your current situation
- Understand a little more about how we can potentially help

##### **2. Catch up:**

Meeting for up to 1-1.5 hours to get to know each other and explore where you are today, discuss what's on your mind, uncover your financial concerns, highlight potential opportunities and table any issues of relevance. We outline some basic concepts, discuss different options and do some real time number crunching to give you a sense of direction and how we can help. If we need more time together we will book another meeting to keep the momentum going.

##### **3. The next steps**

We agree on the way forward and provide written confirmation of the next steps, what you can expect, how we will work together and outline the investment required to make it happen.

*"I feel so **relieved** that I have finally taken the first step"*



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## 2

### CRUNCHING THE NUMBERS

We put on our thinking cap, process your big picture and gather any further information required to fully understand your position. We analyse the real life data, crunch the numbers, do the research and model the options to determine the best course of action to help you get meaningful results.

#### *What's involved?*

During this stage we draw upon our years of experience, technical expertise, tap into available resources we may need and bring your advice and recommendations to life. Your role is to get excited about 'what could be' and provide any additional information we may need.

We may need to liaise with your other advice professionals to ensure we are all on the same page and that your best interests are the priority.



*"I feel more in **control** knowing our financial affairs are in the hands of an expert who knows what to do and **can take my worry away**"*

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*"I am **comfortable** and fully understand how this advice will benefit me and improve my situation"*

## 3

### YOUR WRITTEN ROAD MAP

We provide a detailed explanation and written documentation of the the proposed solutions we believe you need to put in place to improve your situation.



#### *What's involved?*

Sitting down together for around 1.5 hours, we outline our advice and recommendations, explaining it in as much detail as you need to fully understand what we have suggested and why.

#### *During our meeting we:*

- Summarise the key points and explain how the different facets of your financial life fit together
- Highlight the options available make sure you understand any potential trade-offs
- Provide examples, pictures and diagrams to help simplify complex issues
- Encourage you to ask questions, provide feedback and put forth alternative suggestions
- Provide everything we discuss in writing as a reference for the future

*We appreciate this is a big decision and you may need time to digest and reflect on what this means for you.*

You may wish to consult others involved in helping you make important financial decisions and we are available on the phone or to schedule another meeting and discuss and clarify anything until you are comfortable and ready to proceed.

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## 4

### THE PAPERWORK – MAKING IT HAPPEN

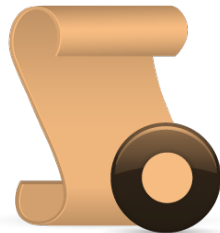
We take the administrative burden off your plate and turn your advice and recommendations into actions and results.

#### *What's involved?*

Getting all the paperwork completed properly and timely is critical to get you up and running as soon as possible. We will help you complete any applications, form or documentation required so they are completed accurately to avoid any delays in processing.

We will proactively manage the relationship with third parties, follow them up and keep you in the loop at all times. This saves you time and worry as depending on what needs to be done, this can be a frustrating and drawn-out process.

We will provide confirmation once this stage is complete and outline what happens next.



*"I have real **peace of mind** as I can forget about the worry and focus on the fun stuff. It's a huge weight off my shoulders"*

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## 5

### ONGOING PROGRESS – KEEPING YOU ON TRACK

Keeping you on track and making sure you follow through with your financial commitments so you experience the results you said were important and continue to make positive progress.



*“Total **satisfaction** that I am seeing results that I would not have been able to achieve by myself.”*

#### *What’s involved?*

Working together on an ongoing basis enables us to stay on top all the moving pieces involved in ensuring you have the financial resources required to live a more fulfilled life. The way we do this includes:

#### **1. Formal progress meetings**

We meet at least once a year (up to 4 times depending on your situation). Over 1- 1.5 hours we reset your expectations and provide clarity and benchmarking around what has happened and where to from here. We assess the appropriateness of your advice and make adjustments where necessary.

#### **2. Provide valuable knowledge and education**

To help you understand the options, risks and implications of any financial decisions, we share necessary resources and information through our monthly newsletter, regular communications and important updates (ie. budget, economic, legislative, markets etc.).

#### **3. Access to me whenever you need**

If you have any questions, concerns, decisions to make or anticipate something specific or urgent is about to happen (or has happened), we are available to discuss the options and help you make a smart informed decision.

#### **4. Proactive contact**

We will reach out to you where we identify relevant opportunities or address changes that need to be made to keep you financially prepared as you move through the many transitions of life.

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