









Discovery Meeting

60 minutes

Getting to know each other. We will start scoping out your needs and identify opportunities to get your financial house in order. You will have the opportunity to explore our expertise, our services and our team.

Research & Prepare **Tailored Model Strategies** 4-6 hours

Concept Meeting

2 hours

We will provide you with an overview of concept strategies tailored specifically for your situation and outline all fees.











Implementation of Advice & follow-up as required 8-10 hours

Advice Presentation Meeting

2 hours

We will present you with your personalised Financial Plan and clearly explain how our recommendations will help you achieve your most important goals.

Advice Preparation

8-10 hours (time dependant on individual's situation)







Post Implementation Meeting 60 minutes

Once our highly-skilled team have implemented your advice, we will confirm any investments/ cover that have been put in place and outline our process for ongoing reviews.

Ongoing Service & Review Meeting

90 minutes

We are there for you to contact whenever the need for advice arises. We will also provide regular reviews to ensure your plan stays on track.

