

## Terms of Business



We'll start by introducing ourselves to each other; ascertain that we are happy to work together; and identify the financial objectives that we can help you with. *(Client Service Agreement)*

The Advice Process then continues through ongoing service and maintenance. It's vital that your plans are well maintained, and kept firmly on-track. *(Client Service Plan)*

## Ongoing Service



If you are happy with our advice and recommendations, then we'll complete the necessary application procedures, and implement your preferred Financial Planning arrangements. *(Application Forms)*

## Implementation



# The Advice Process

## Understanding You



Next, we need detailed information about your personal circumstances, financial arrangements, needs & objectives, and financial attitudes. *(Client Fact File)*

## Advice & Recommendation



Now, we can create financial solutions that suit you as a person and your ongoing needs and objectives. *(Financial Planning Report)*