

# The 12 Point Financial Health Check

1	<b>Your Issues</b>	An update by you on issues requiring attention
2	<b>Strategic Review</b>	An update by your advisor on recommended changes to strategy
3	<b>Investment Review</b>	Looking back at the past 12 months' performance
4	<b>Investment Action Plan</b>	Looking forward and implementing changes to investment strategy
5	<b>Debt Review</b>	Reviewing your interest rates and debt structuring arrangements
6	<b>Taxation Update</b>	Reviewing opportunities and threats arising from changes to taxation law
7	<b>Pensions Update</b>	Reviewing opportunities and threats arising from pensions law
8	<b>Insurance Review</b>	Providing a check on current levels of cover policy terms and conditions
9	<b>Estate Planning Review</b>	Ensuring your estate planning wishes are currently legal and valid
10	<b>Removal of Hassle</b>	Sorting out any relevant paperwork that confuses you
11	<b>Family Review</b>	Discussing any financial issues affecting your family
12	<b>Professional Update</b>	Providing professional updates to your accountant and other advisors