

The Define Five Step Financial Planning Process

Our financial planning process consists of five stages designed to help you meet your financial and lifestyle goals...

1 Fact Find & Risk Profile

Agree your investment aims, objectives & attitude to risk

2 Tax Strategy

Assess your tax needs to ensure the most tax efficient implementation of your investment strategy

3 Financial Plan

Make the Financial Plan recommendation & seek mutual agreement on the way forward

4 Investment Implementation

Implement your portfolio using technology & a controlled risk approach

5 Ongoing Advice

Provide regular reviews to ensure you remain on track to meet your goals

