Our advice process

Introductory meeting (one hour)

The first step in our advice process is to arrange an introductory meeting. This meeting provides the opportunity to discuss your current situation and requirements, as well as your goals for the future. We can also explore how we may be able to help you.

14 - 21 days

Commence research and modelling (6 - 8 hours)

Should you wish to engage our services, our work begins on reviewing and assessing alternative financial models and investment scenarios appropriate to your needs and circumstances.

Strategy meeting (one hour)

At this meeting we will provide you with a high level overview of our proposed strategy and seek your feedback and input.

7 - 14 days

Strategy development (12 - 14 hours)

Development of the detailed strategy and recommendations and preparation of your personalised plan (Statement of Advice document).

Strategy presentation meeting (one hour)

At this meeting we will present your tailored financial strategy and explain how our advice and recommendations will help you to achieve your goals and aspirations.

7 - 21 days

Implementation of advice (8 - 10 hours)

Once you are comfortable with our advice and recommendations, the next step is to implement the detailed strategy as outlined in the Statement of Advice.

Ongoing

Ongoing advice and regular reviews (ongoing)

To ensure your financial strategy remains on track to meet your objectives (which may change over time), we will meet with you regularly to review the performance of your investments and make any adjustments that may be required.