



Discovery and Strategy Meeting

30 - 60 minutes

This step involves getting to know each other! We will ask questions to best understand your total situation and get to know what is important to you.



Research and Modelling Strategies

2 - 6 hours

We take all the information provided and model various strategies to ensure the best possible outcome.



Advice Presentation Meeting

60 - 90 minutes

This is where we present to you your personalised financial plan with clear recommendations to help you achieve your goals.



Advice Preparation

4 - 8 hours

Once we have determined the appropriate course of action we prepare a personalised financial plan.



Advice Implementation

5 - 10 hours

If you decide you like our recommendations and want to go ahead, we will implement your strategy and ensure everything is set up correctly and managed efficiently.



Ongoing Service & Review Meeting

60 - 90 minutes

We are here for you whenever you need. As life changes, so does your plan. We regularly review your plan to ensure it continues to meet your needs.



Financial Planning Journey

Planning for your future



An Addition to Your Business