

YOUR FUTURE STRATEGY

12 MONTH FINANCIAL ROAD MAP



DATA COLLECTION

WEEK 1 - 2

First up, we gather your personal information and discover your current position and determine your individual personal & financial goals.

YOUR FUTURE PREVIEW MEETING

WEEK 3 - 4

Next, we sit down with you to determine what is important to you and how you'd like life to look in 10 years from now. This helps us develop our initial advice and define your 12 month Financial Road Map.



INTERNAL STRATEGY MEETING

WEEK 5 - 6

This is when our internal departments meet collectively and determine actions to build, manage and protect your wealth. Our team are subject matter experts and they will assess, organise and align a plan that is well-suited to your position, goals and objectives. .

YOUR FUTURE STRATEGY MEETING

WEEK 7 - 8

In this step, we meet with you again to discuss the general strategies we recommend in order to best position for financial success.



SPECIFIC GROUP STRATEGIES

WEEK 9 - 12

This final step is where we formulate detailed plans specifically around Finances, Lending, Accounting, Insurance, Estate Planning, Tax & Debt Planning and Investment & Superannuation plans.

IMPLEMENTATION OF STRATEGIES

WEEK 13 - 52

This final stage of our process is where we implement all of the specific strategies we have devised as part of your plan.

