



Engagement

The process starts with getting a bit of information about you, we send through a quick and easy online questionnaire to be completed before our initial meeting.



Initial meeting (one hour)

We catch up as a formal 'Hello' during this meeting we will have an in-depth discussion about your financial goals and circumstances. We will have prepared some initial projections and strategy ideas to discuss, as well as answer any of your questions. The initial meeting goes for 1 hour and costs a flat fee of \$275.00 (incl GST).



Goals, investments and everything else (2 - 4 hours)

If we are proceeding to prepare advice, we will arrange a follow-up meeting, to confirm the finer details with you such as scope of advice and investment risk appetite.

We will prepare a Letter of Engagement and a recap of your circumstances to review as the last step, just to make sure we are all on the same page and transparent on the fees and services.



Research and Development (15 - 20 hours)

Our initial plan begins by evaluating possible alternative strategies to determine which is appropriate to your needs and financial goals. From there, we deep dive into the products and strategy mix, working towards your goals as our guiding post. And wrap it all together in a Statement of Advice that details all the ins and outs, benefits, implications, fees and steps involved.



Advice presentation (1 - 2 hours)

Together we go through the recommendations in detail, explaining each point of the benefits and the implications of the advice. We aim to provide you with information and educate you about the strategies and products recommended, so you not only know but understand the 'What' and 'Why'. Because at the end of the day, it is YOUR money and we are advising on what you should do with it.



Implementation (8 - 10 hours)

Once you are happy with our recommendations, we put it to work. We will pull together the paperwork and complete the implementation for you. There may be a few things for you to do but we will take care of the heavy lifting for you.

Preparation

2 Weeks

2 - 4 Weeks

4 Weeks