

## *The 12 Point Financial Health Check*

### *1 Your Issues*

An Update By You On Issues Requiring Attention

### *2 Strategic Review*

An Update By Your Adviser On Recommended Changes To Strategy

### *3 Investment Review*

Looking Back On The Last 12 Months Performance

### *4 Investment Action Plan*

Looking Forward & Implementing Any Changes To Investment Strategy

### *5 Debt Review*

Reviewing Your Interest Rates & Debt Structuring Arrangements

### *6 Taxation Update*

Reviewing Opportunities & Threats Created By Changes To Taxation Law

### *7 Pensions Update*

Reviewing Opportunities & Threats Created By Changes To Pension Law

### *8 Insurance Review*

Providing A Check Of Current Levels Of Cover & Policy Wording

### *9 Estate Planning Review*

Ensuring Your Estate Planning Wishes Are Current & Legally Valid

### *10 The Remove The Hassle Service*

Sorting Through Any Paperwork Received That Confuses You

### *11 Family Review*

Discussing Any Financial Issues Affecting Your Family

### *12 Professional Update*

Providing Professional Updates To Your Accountant & Other Advisers