



12 Point Financial Health Check

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