



# *The 12 Point Financial Health Check*

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- 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 outside of the couple, as well as their joint goals within the relationship, are met..