

12 Point Financial Health Check

1. *Your Current Goals & Objectives*

An update on your personal circumstances & any issues that you might wish to raise.

2. *Strategic Review*

An update by your Financial Planner on your recommended strategy

3. *Investment Review*

Looking back on the last 12 months performance against your goals & objectives

4. *Investment Action Plan*

Looking forward & implementing any changes to investment strategy

5. *Debt Review*

Reviewing your debt position & associated costs

6. *Taxation Update*

Reviewing opportunities & threats created by changes to taxation rules and regulations

7. *Pensions Update*

Reviewing opportunities & threats created by changes to pension legislation

8. *Family Exposure to Risk Review*

Audit check of ongoing cover requirements

9. *Estate Planning Review*

Ensuring your wishes are current & appropriate given current legislation

10. *Remove the Hassle Service*

Sorting & checking paperwork received in the last 12 months

11. *Family Review*

Discussing any financial issues affecting your family

12. *Professional Update*

Providing relevant professional updates to your accountants & other advisers

Advise Better
Live Better