

TAKE CONTROL OF YOUR FINANCES

THE FIRST STEP is being aware of your goals, short and long term.



We understand that everyone is at a different stage in life and have personal 5, 10, 15 and even 20 year targets. Allow our "Financial Road Map" guide you to better understand the services required to reach your targets and map out your ideal future lifestyle.

YOU YOU

What you would personally like to achieve? Do you have a particular interest you would like to spend more time on?



YOUR FAMILY

What is important to your family? Is it financial security, planning for the future or protecting what you already have?



YOUR RETIREMENT

Are you ready for retirement? Have you thought about what lifestyle you'd like to maintain and how you will be able to achieve it?



YOUR MONEY

How can you be better with your money? Do you know where your money is going? Do you know when you will have enough to fulfil your goals?



YOUR LIFESTYLE

How important is your lifestyle to you? What do you prioritise above all else - travel, work life balance, assets?



YOUR HOME

What is important to you about your home? Are you looking to renovate, relocate or downsize?



YOUR CAREER

What are your career goals? Change career path? Planning on promotion? How would you cope if you were made redundant?



YOUR BUSINESS

What is important to you for your business? Are you looking to grow or go?



YOUR HEALTH

You are your most valuable asset, are you prepared for the future?



YOUR COMMUNITY

How involved do you want to be in your community?



YOUR DREAMS

Is there something special that you have always wanted to do but never thought you could?



TECHNOLOGY

Is your adviser connected in real time to your financial information?



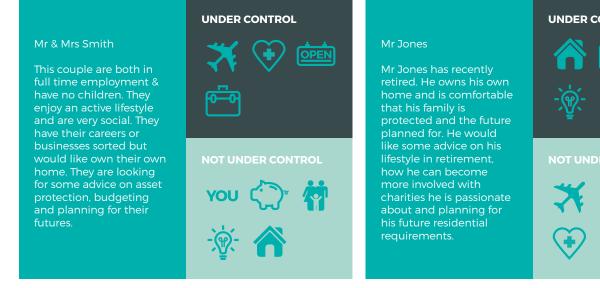
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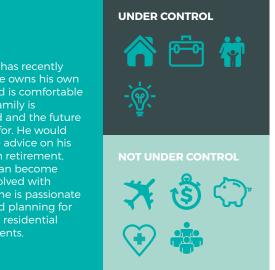


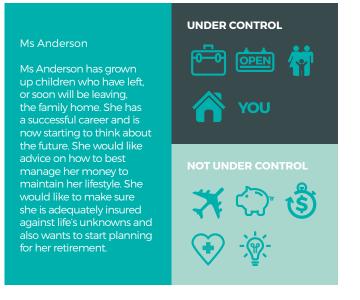


UNDER CONTROL Take note of your current lifestyle, career, wants and goals for the future. What areas of your life do you think you have under control? What areas need attention? Your current lifestyle, career and future wants. YOU YOU YOUR FAMILY YOUR RETIREMENT YOUR MONEY NOT UNDER CONTROL YOUR LIFESTYLE YOUR HOME YOUR CAREER YOUR BUSINESS YOUR HEALTH YOUR COMMUNITY YOUR DREAMS TECHNOLOGY

No two clients are ever the same. Here are some typical client situations







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YOUR CURRENT LIFESTYLE, CAREER AND FUTURE WANTS.		UNDER CONTROL			
		NOT UNDER CON	NTROL		
YOU YOU YOUR FAMILY	YOUR RETIREMENT	YOUR MONEY	YOUR LIFESTYLE	YOUR HOME	
YOUR CAREER POUR BUSINE	SS YOUR HEALTH	YOUR COMMUNITY		TECHNOLOGY	