

## **Our Six Step Financial Planning Process**

---

Advisers at Financial Solutions follow a Six Step Process to provide you with comprehensive, up to date and specific advice.

### **1) Gathering information about your current situation**

To develop a comprehensive financial plan, we need to understand your situation. Our in-depth fact finding analysis assesses your lifestyle and income requirements, your financial commitments, taxation issues, estate planning needs and superannuation strategy.

### **2) Establishing your short, medium and long term goals**

We listen to your financial and lifestyle goals and work with you to help make them a reality.

### **3) Identification of issues that need to be addressed**

We identify and explain to you the issues and problems that may stand in the way of achieving your goals.

### **4) Strategy recommendations**

Our strategies will be comprehensive, innovative and tailored specifically to you.

### **5) Implementation of the plan**

Once we agree upon the strategies, we implement them in a timely and accurate fashion.

### **6) Ongoing review**

We are committed to providing an ongoing and personalised service to ensure that recommendations in the Plan are still relevant to your changing lifestyle and the current economic climate.