SUDDEN WEALTHFLOW™

The Wealthflow Consultative Process.

To understand your needs, we must understand you.

This goes far beyond investment management and into the realm of your most important values, relationships and lifelong objectives.

DISCOVERY MEETING

The purpose of this meeting is to find out what is most important to you.

INVESTMENT PLAN MEETING

From what we learn in the discovery meeting, we will prepare:

1. an Investment Plan and
2. an Investment Policy Statement.

usually 1-2 weeks from discovery meeting

Here we will present you with a detailed road map that will maximise the probability of achieving everything that is important in your financial life.

MUTUAL COMMITMENT MEETING

At this point, a mutual decision on whether we can help you achieve your life plan will be made.

usually 2-3 weeks from investment plan meeting

Here we will move ahead to implement the Investment Plan recommendations.

45 DAY FOLLOW-UP MEETING

This meeting helps explain and organise the financial paperwork.

45 days suits most clients

Following implementation of the Investment Plan a significant amount of paperwork will be generated. We will ensure that the practicalities don't become overwhelming.

A team of carefully selected experts will help create the most appropriate Wealth Management Plan for you.

3 WEALTH MANAGEMENT PLAN

REGULAR PROGRESS MEETINGS

Scheduled at intervals convenient to you, regular progress meetings allow us to review any changes in your situation and determine if adjustments to your Wealth Management Plan are needed.

We review progress towards your long-term financial objectives.

90 days between progress meetings suits most clients

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