Understanding the financial advice process

How we will help you achieve your financial goals

Step 1: Fact Finding

We will meet you virtually to discuss your goals, objectives and needs. Our conversation will include what you are wanting to achieve, as well as the services available to you.

What do you need to do?
You will need to complete an initial online discovery questionnaire. This will help us to understand your needs. If you can't answer some of the questions, we'll be able to help you through it.

Step 2: Research

Using your information, we will conduct research on your financial situation to show different financial strategies and potential product solutions to help you to achieve your goals and meet your objectives.

What do you need to do?
While we conduct our research, you will have time to reflect on our initial conversation; please ensure to raise any additional thoughts you may have before or during the virtual Interim Strategy Meeting.

Step 3: Interim Strategy Meeting

We will discuss the preliminary research with you online, as most findings will have more than one strategy option. This provides foundations for a personalised strategy that you feel more comfortable with, more in control and empowered for the next stages of final advice.

What do you need to do?
While we conduct the interim strategy meeting it will allow you to consider the 'trade-offs' for each option, allowing you to fine-tune your goals and preferences even further.

Step 4: Final Research and Plan Preparation

From our virtual discussion we will conduct final research and prepare you a financial plan, known as a Statement of Advice, that will outline the strategies we recommend for you.

What do you need to do?
You won't need to do anything during this time. We will be in contact with you when the plan is complete.

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Step 5: Sharing with you

We share our findings with you, using powerful online technology and whiteboards, bringing your personalised strategy to life, in your Statement of Advice.

What do you need to do?
Read through the Statement of Advice, to make sure that you understand the recommended strategies. Take the time to understand the financial plan and ask us any questions you may have. If you would like any amendments made, please let us know at this time.

Step 6: Implementing our advice

If you agree with our recommendations, we will implement the strategies and any product solutions on your behalf. We will not implement our advice unless authorised by you.

What do you need to do?
If you agree to the recommendations, we will provide you with application forms for you to securely sign online. These forms help us to implement the strategy and product recommendations.

Step 7: Finalised Implementation Meeting

As the implementation of the advice strategies can take anywhere between 3-16 weeks, this unique personalised virtual meeting is to provide you with clarity so you can keep track of your money, strategies and performance. We will also cover housekeeping for our ongoing service.

What do you need to do?
We will take you through your client log-ins, Hello Wealth App and if relevant, any new portfolios and platforms via share screen, so you can learn how to access and keep track of your money.

Step 8: Keeping in contact

Your circumstances and your goals, to ensure you keep on track. Your ongoing service agreement will outline when we will meet again to review your financial situation and goals.

What do you need to do?
You don't need to wait until your review date to be in contact with us. Let us know at any time if your situation or circumstances change.

GET IN TOUCH

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