



Financial Review



Financial Review Service

Our Financial Review service supports you to clarify your goals and structure your personal finances to achieve your desired lifestyle over the long term. Your adviser will work with you to develop a bespoke financial plan that will:

- Provide a clear picture of how you stand financially
- Identify actions to ensure your finances are working as best they can
- Ensure you're financially well-organised
- Navigate complexity and jargon

The DESIRE Method and Guiding Principles

Discover	Understand your current circumstances and future goals
Evaluate	Develop a clear picture of where you stand financially
Strategy	Formulate an action plan to align your finances with your desired lifestyle
Implement	Put plans in to action
Realise	Live the life you desire
Evolve	Ensure things remain on track over time

Service fees

We charge a fixed fee for delivering valuable advice, not for selling products.

If product recommendations are made as part of your financial plan, we do not receive any additional remuneration and there is no additional charge to you.

The cost of conducting your review, developing and implementing your financial plan will vary depending upon the exact nature of your requirements.

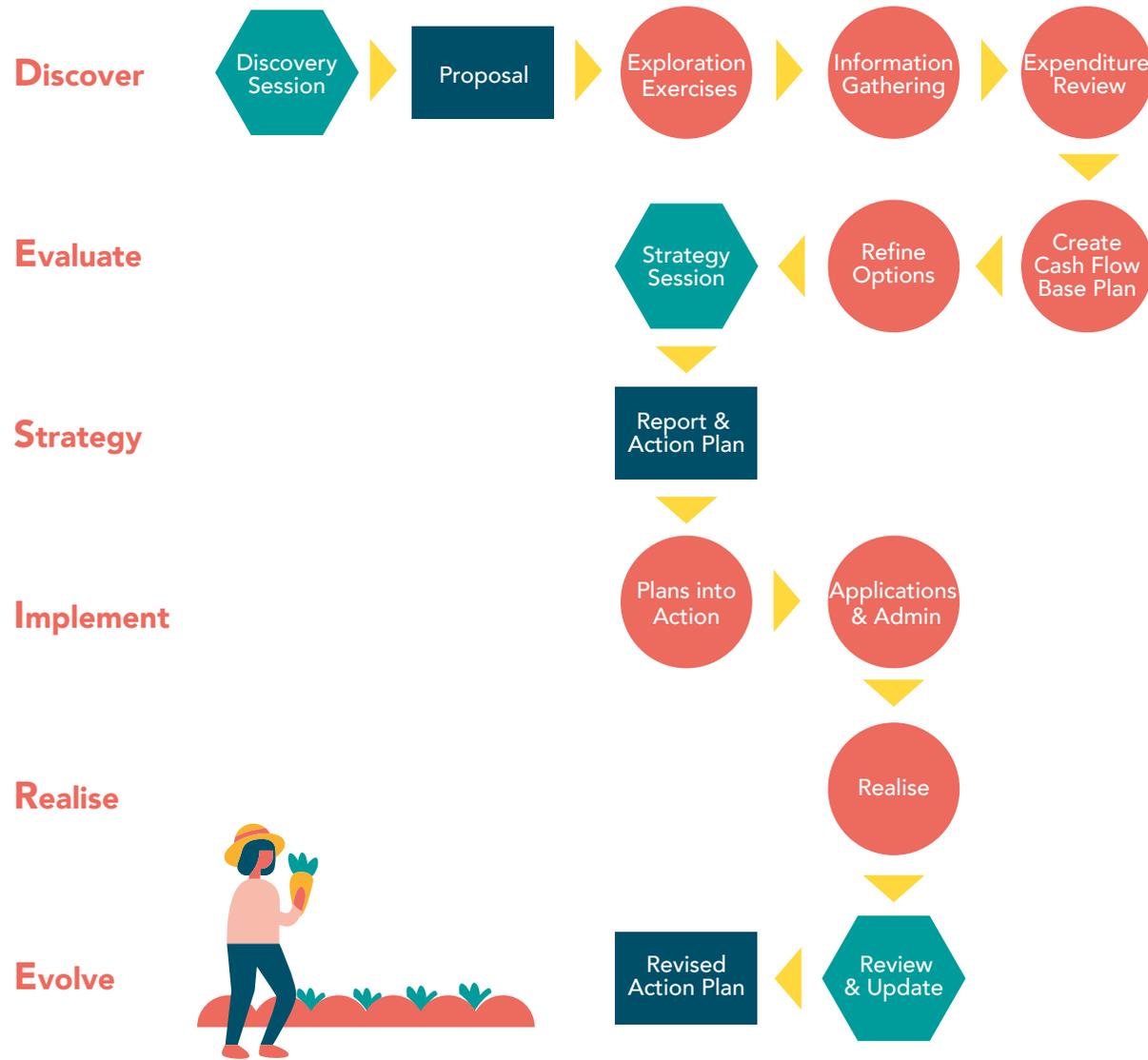
A typical review will cost between £2,695 and £3,995, but your adviser will provide you with a detailed proposal document following your discovery session.

“Excellent prompt efficient help!”

Joseph, 47



The DESIRE Financial Review Service ...



"I found my adviser to be extremely professional, sensitive and supportive throughout the process of looking at how my finances could be best managed to enable me to have the lifestyle to which I aspire."

Madeleine, 35

Contact us today
to arrange your complimentary
discovery session

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