financial freedom BY DESIGN

Client Advice Journey Flowchart

Discovery meeting - 90 mins

Initially we will cover two important areas. Where you are now and where you would like to be in the short, medium and long-term. Knowing *what's important to you* enables us to design a plan that is personalised to you.

FFBD preparation between meetings

Research and Prepare Strategy Options for Advice (3 - 4 hours)

Strategy meeting - 90 mins

Here we will compare your current plan with some personalised alternatives. This will give you all the information you need to make an informed decision based on what is important to you.

14 days

Research and Advice Preparation (4 - 8 hours)

This part of the process is at our cost.

14 days

Advice presentation - 60 mins

We will present you with your own personalised plan to commence your journey towards financial freedom.

Implementation of Advice, follow up as required (2 - 6 hours)

Client Satisfaction meeting - 60 mins

We will take the time to ensure that you understand the strategy we have put in place for you, as well as the investments and insurance placed on your behalf. We will seek your feedback on your experience so far and your key priorities for the next 12 months.

Depending on your strategy this will be between 2 weeks and 3 months

Review meeting - 90 mins

Our advice and support does not end once your plan is underway, it is only the beginning. Your plan is an ongoing advisory service - we are there for you to ensure you remain on track to achieve your goals and make any adjustments as required.

Average Consultation Hours = 5

Average Hours of Strategy Construction = 13.5 hours