ARCHIMEDES
FINANCIAL PLANNING

Financial Planning Process

No obligation stage
Until estimated costs of advice are specified and agreed

Initial Discussions
re aims and concerns

- Fill in parts of Client Data Form
- Nominate goals (near, long-term)
- What are main issues, concerns?

Strategy Stage
(specifies costs & benefits of different options)

Detailed **Data Gathering**

- Complete Client Data Form
- Detailed information on goals

Education Processes
eg meaning of "risk"

- PowerPoint presentations
- Complete *Risk Profiler* questions
- Generic strategies workbook

Analysis of Current Situation
Requirements to meet financial goals

- Are goals realistic?
- What minimum risk is required?
- Personal insurances

Define relevant choices
Review pros and cons of strategies

- Different risk strategies
- Efficient use of debt
- Super vs non-super
- Ownership structures

SoA Stage
(You decide to proceed to SoA)

You make the informed decisions

- Revised goals
- Balance of risk & return
- Required flexibility

We prepare Statement of Advice (SoA)

You Approve
Statement of Advice

- Place investments
- Apply for personal insurances
- Estate Planning

Ongoing Reviews & associated costs
(covers research, reports & portfolio adjustments)

We Review Investments
every 6 - 12 months; you approve changes
Ongoing adjustment of Plan

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