PROGRESS

Timeline of advice

1 Engagement interview

- Now, where, how
- Scope of work
- 1 page plan
- Fees

2 Information - Fact finder, data collection

- Personal
- Accountant
- Legal

3 Scenario Planning

- Form work discussion document
- Gap analysis for desired capital & income on retirement
- Investment overlay
- Income gap analysis
- Wills

4 Game Plan doc – re-meet with client to discuss scenarios

- 3 months - 6 months - 12 months See outlined Flow chart

5 Project Manager - Implementation

- Estate - diagram, flow charts, how assets fall into estate
- Insurance - income to estate, estate equality
- Acct/Legal
- Structure – review asset protection/tax efficiency
- Investment

6 Keep track of TASKS – XPLAN etc, CMS

- Investment & Cash allocation
- Desired investment allocation
- Cash allocation
- Scenario of capital accumulation
- Diversification and risk management
- Explain liquidity
- How much capital required for retirement

7 Review and update Documents

- Financial
- Cashflow
- Investments
- 'LIFE'
- Review document