

Financial Health Check

Client:

Date:

Agenda

1. Your issues: an update by you on issues requiring attention
2. Strategic review: an update by your adviser on recommended changes to strategy
3. Investment review: looking back on the last 12 months performance
4. Investment action plan: looking forward and implementing any changes to investment strategy
5. Debt review: reviewing your interest rates and debt structuring arrangements
6. Taxation update: reviewing opportunities and threats created by changes to taxation law
7. Pensions update: reviewing opportunities and threats created by changes to pension law
8. Insurance review: providing a check of current levels of cover and policy wording
9. Estate planning review: ensuring your estate planning wishes are current and legally valid
10. The remove the hassle service: sorting through any paperwork received that confuses you
11. Family review: discussing any financial issues affecting your family
12. Professional update: providing professional updates to your accountant and other advisers

Notes



Member of the
UK
Social
Investment
Forum