



12 Point Financial Health Check

Included in our Optimum Services and conducted each year (Premium) or every 3 years (Core).

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- 1** **Client Information**
Update records since last review.

 - 2** **Your Issues – Aims & Objectives**
Update and discuss issues requiring attention.

 - 3** **Investment Review**
Looking back and reviewing performance over the period.

 - 4** **Financial Risk Assessment**
Review and make amendments accordingly.

 - 5** **Investment Action Plan**
Planning forward and implementing any recommendations.

 - 6** **Tax & Legislation Update**
Changes that might affect your investments or life plan.

 - 7** **Life Planning**
Reviewing income in retirement (Pensions / Investments / Capital Withdrawals).

 - 8** **Protection Review**
Check ongoing suitability of insurance, levels and type of cover.

 - 9** **Debt Review**
Assess debts and suitability of loan repayment vehicles.

 - 10** **Family Review**
Consider other matters (Inheritance Tax, Wills, Gifting, Estate Planning).

 - 11** **Remove the Hassle**
Review all paperwork & 'de-clutter'.

 - 12** **Professional Updates**
Liaise with & co-ordinate other advisers (accountant / solicitor).
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