12 Point Financial Health Check

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

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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