

The Key Benefits of Financial Advice

Are you getting the help you need?

INVESTMENTS

Investment
Policy
Statement

Tax-efficient
savings
strategy

Asset allocation advice &
Diversification

A shield between you and
product salespeople

Consolidation of your
investments.

Proactive (not
reactive) tax planning

Education on
legislation changes

FINANCIAL PLANNING

Annual
planning
meetings

Formalise your goals

Accountability partner

Second opinion service

Ad-hoc
meetings for
important
decisions

Outsourced financial
administration

Unlimited access for
money questions

Tax-efficient
retirement income
plan

Withdrawal Strategy.

Prioritise financial
opportunities

No judgment,
impartial advice

Helping you
avoid regrets

A 'don't do that'
service

Support during
volatile markets

A voice of reason
during emotional
decisions

OTHER

Someone who cares
about your financial
future

Independent
sounding board

Identifier of life
transitions

Referrals to
other
professionals

Someone to tell
you what you
need to hear

Thinking
partner

Support for a
surviving partner

Coordinator
between all your
professional
advisers

Financial project
manager

Scam avoidance

Lessons from
other clients

TAX PLANNING

Tax-efficient
estate planning

Guidance during
tax season

BEHAVIOURAL

tandem.