

Life is full of little questions

***How much** do I need to earn, save or sell my business for to give me what I want out of life?*

***'What** level of investment return do I need to achieve my objectives?'*

***'When,** precisely, can I afford to stop doing the things that have become a drag...and start doing the things I really enjoy?'*

***'How** can I ensure that I can maintain my lifestyle in the future?'*



***'What do I have to do** to ensure that I **NEVER** run out of money?'*

And possibly the biggest question of all....
***'How much** is enough?'*



- ❑ As your partner in building wealth and security, we focus on ways that we can help you to live the life that you want to live
- ❑ By engaging Chartwell Financial Services you assure yourself of regular financial checkups and access to new concepts brought to you by the Chartwell team
- ❑ Choosing a financial partner is one of the most important decisions you will ever make
- ❑ Take your time, choose wisely, and we hope that we can earn the right to work with you in the future

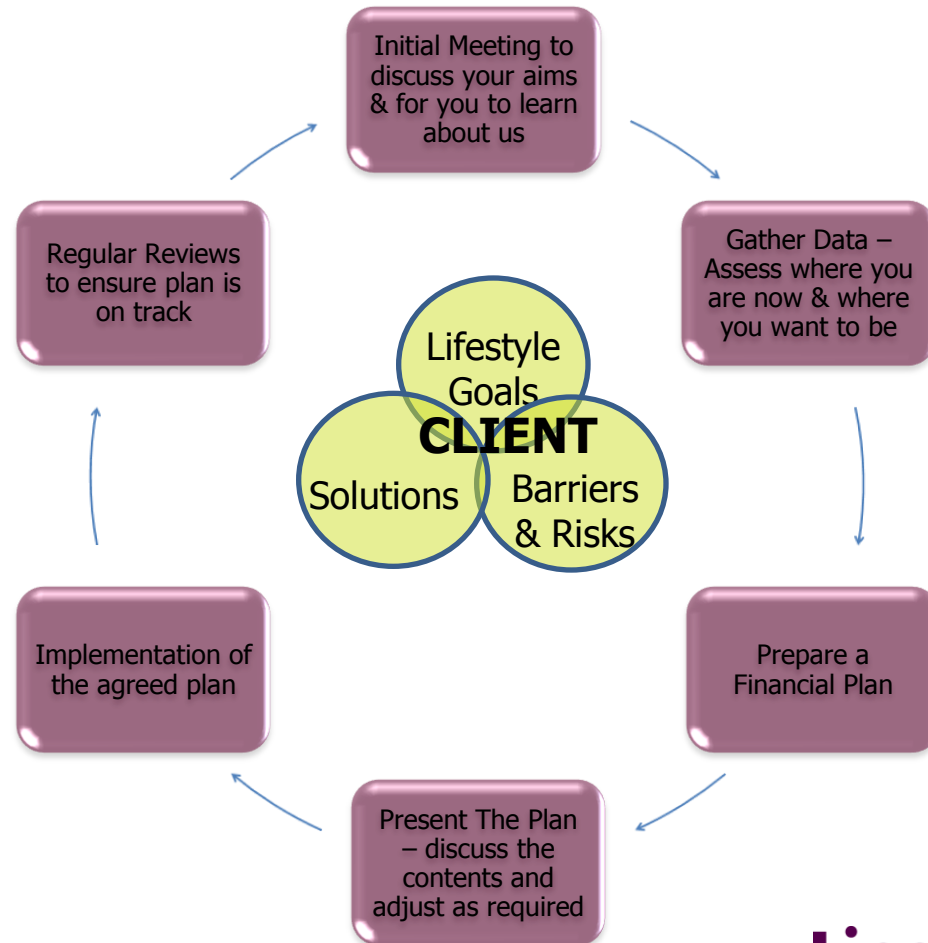
At Chartwell we believe that professional financial advice can offer significant value to individuals and businesses. It's because of this belief that we provide a comprehensive ongoing review service designed to create real value for our clients



Six Steps To Success

- Our “financial planning process” consists of Six Steps to Success
- These steps form the basis of our structured financial planning process
- Our process is designed to:
 - Manage through all market conditions
 - Streamline the services we provide
 - Remove reliance on the skills of one individual

OUR SIX FINANCIAL PLANNING STEPS



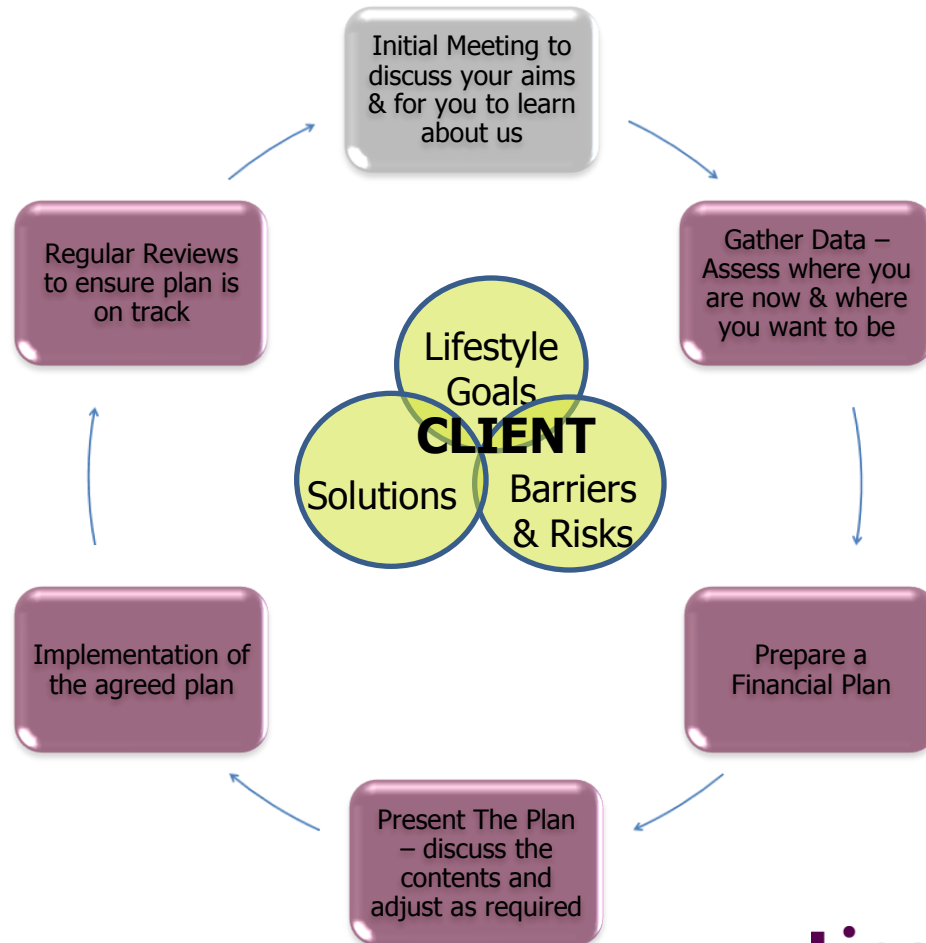
The Start Of The Journey

In the initial meeting we will discuss your lifestyle goals and tell you about the services we offer

We will encourage you to consider:

- Where am I now ?
- Where do I want to be ?
- How do I get there ?
- How will it look when I get there ?
- What happens if I take no action ?

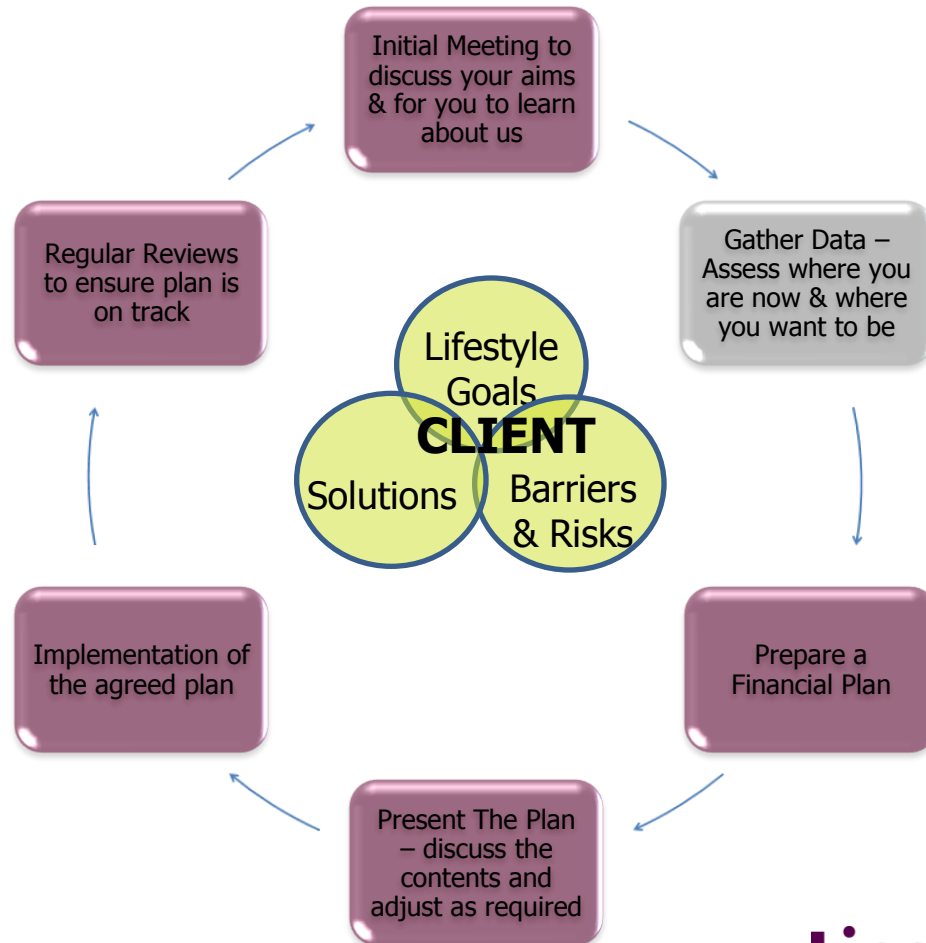
STEP ONE – THE INITIAL MEETING



STEP TWO – THE DISCOVERY MEETING

Gathering All The Facts

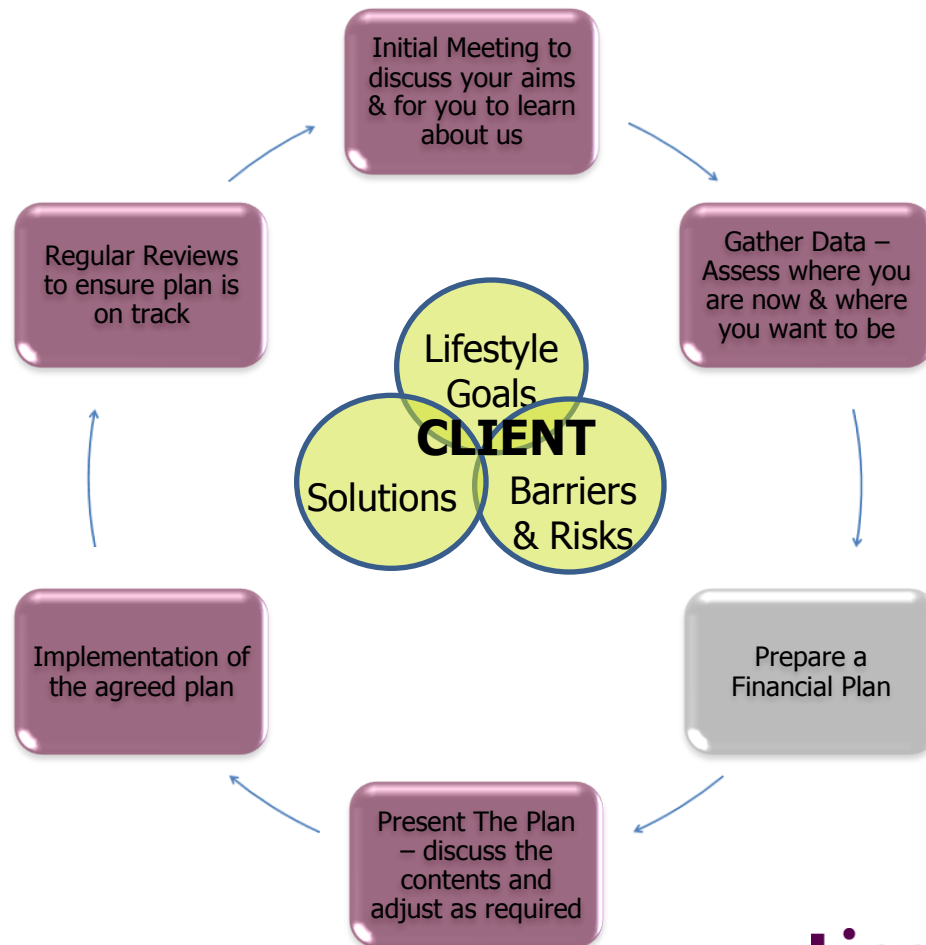
- ❑ To enable us to build a comprehensive plan, we will need to understand all the facts
- ❑ What it is that you're trying to achieve?
- ❑ How do you feel about risk?
- ❑ What types of investment are you invested in?
- ❑ We will gain a full understanding of your current situation and financial objectives.



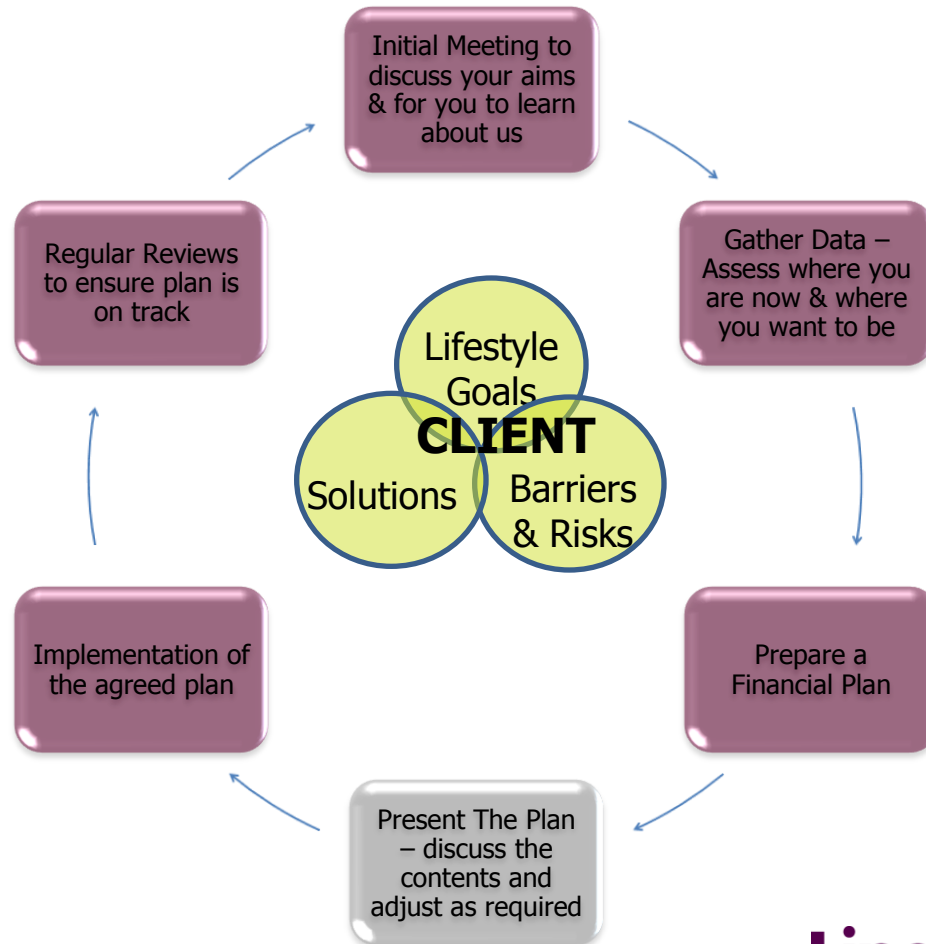
STEP THREE – PREPARING YOUR PLAN

Preparing your report / plan

- ❑ We will consider your attitude to risk and look at life-styling
- ❑ We will offer solutions and alternatives for you to consider
- ❑ We explain our charges up-front and how we get paid
- ❑ We will engage with your other professional advisers if necessary (solicitor / accountant)
- ❑ We consider all the facts and look at short mid and long term



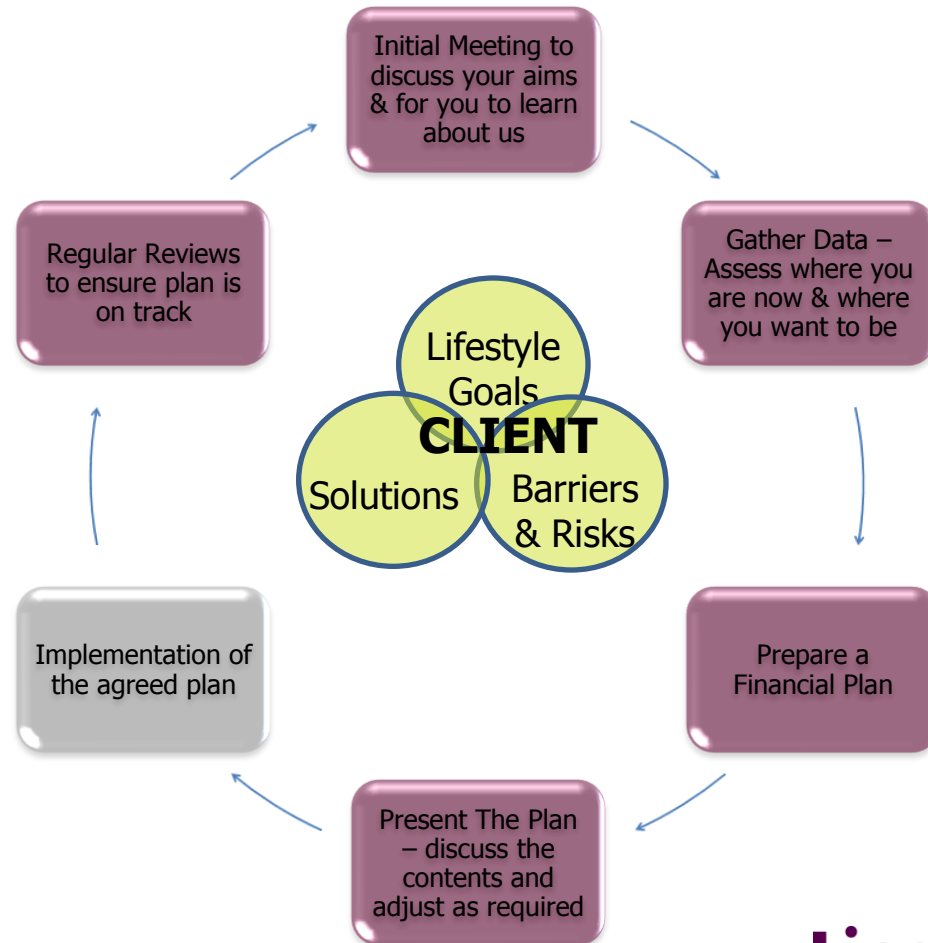
STEP FOUR – PRESENTING THE PLAN



Leaving No Question Unanswered

- ❑ We will present you with your detailed Financial Blueprint
- ❑ A jargon-free explanation will be provided
- ❑ You will have the opportunity to ask questions and provide feedback
- ❑ We will address any of your concerns

STEP FIVE – PLAN IMPLEMENTATION



Putting The Plan Into Practice

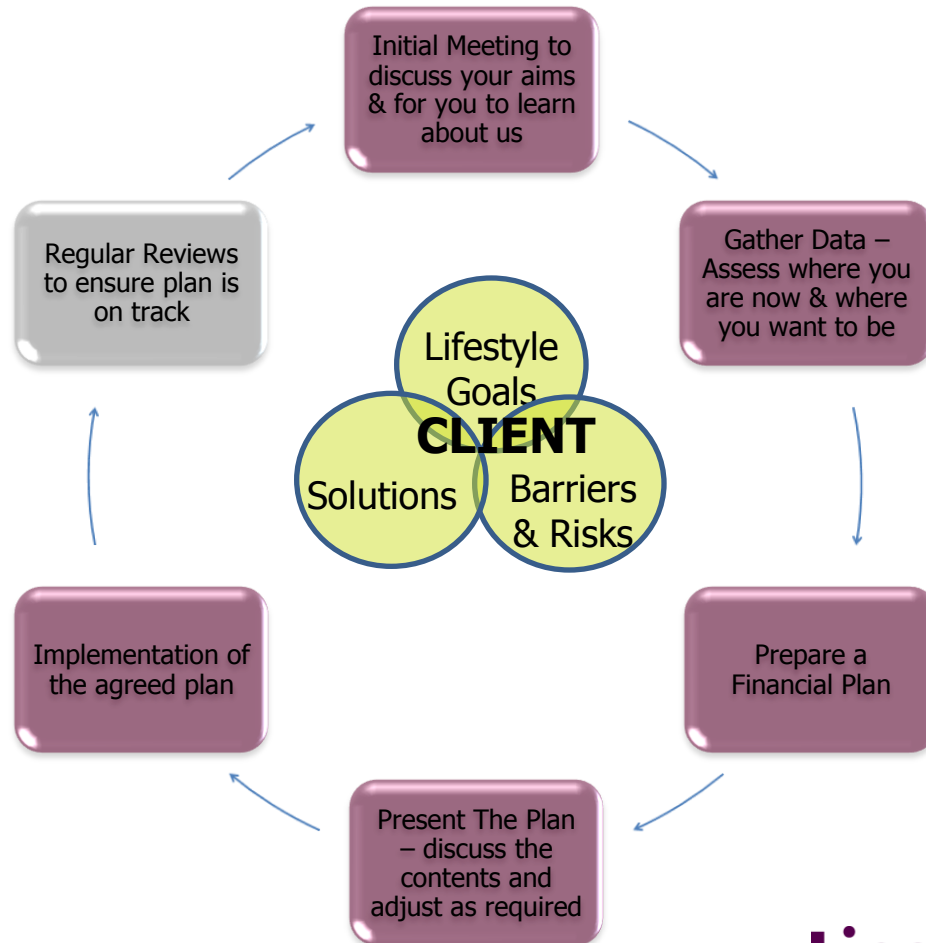
- ❑ Once we have agreed on the final plan that is right for you, we will start implementing the strategy
- ❑ We use a web-based service that enables us to manage your entire portfolio from one web page, regardless of where your investments are held
- ❑ We offer a range of diversified portfolios, designed to help you meet your financial and lifestyle goals

STEP SIX – REGULAR REVIEWS

Making Sure You Remain On Track

Each year we will review your plan to make ensure you stay on track to meet your goals

- Has anything changed?
- How has your portfolio performed?
- Do we need to make any changes



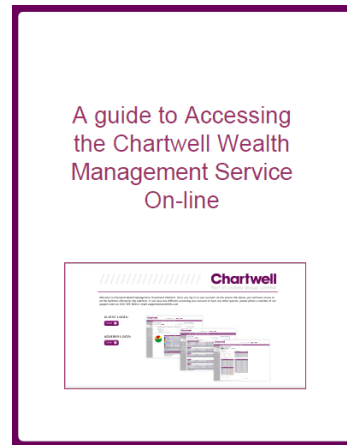
Making Sure You Remain On Track

As well as regular reviews you may have access to online investment platforms that let you complete real time valuations & help you manage your own portfolio.

We also communicate regularly with you providing information on important relevant matters.

Our website is regularly updated and will contain information that you can download and reference as well as leave comment or make requests.

FOLLOWUPS - ONGOING



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