

The Neligan Financial Planning & Advice Process Providing You With Financial Clarity & Peace of Mind Every Step of the Way

An initial meeting to understand you, your priorities and what's important

Outcome: We agree whether or not to work together and understand what either outcome will look like.

Roles & Responsibilities:

I will confirm my regulatory status, services and fees. I will ask questions to understand your situation and priorities.

You: To explain your situation and priorities and ask any questions you may have.

With the financial and non financial data gathered from you and existing providers, I will build an initial plan to forecast the future of your money.

Outcome: A draft plan and 'what if?' scenarios to present back to you.

Roles & Responsibilities:

I will request data from existing providers and build the plan.

I will produce an advice report aimed at implementing the actions identified in the forecasting.

Outcome: A clear understanding of what actions need to be taken to achieve the plan to include advantages, disadvantages, risks and benefits of the recommendations.

Roles & Responsibilities:

I will work with trusted experts to produce the report and send it to you on completion.

The financial plan is reviewed annually with changes made where necessary.

Outcome: you have a greater chance of achieving your lifetime priorities

Roles & Responsibilities:

I will arrange the review meeting each year and contact you in between time where it is necessary to do so.

You: To update me each year of relevant changes to your situation and during the year for more significant changes.

Understand Engage Build Forecast Advise Implement Review

Completion of engagement letter and new client forms.

Outcome: To confirm fees and services and to gather relevant data.

Roles & Responsibilities:

I will provide an engagement letter and new client forms.

You: To complete and return them within 1 week.

A meeting to present your financial future based upon your priorities and financial position.

Outcome: Greater clarity on your current and likely future financial reality.

> Roles & Responsibilities: I will present the financial modelling to you.

Where relevant, a further meeting to discuss the recommendations & complete the paperwork required to implement the recommendations.

Outcome: The recommendations from the planning phase are implemented.

Roles & Responsibilities:

I will submit the paperwork and liaise with all relevant parties to ensure the recommendations are implemented in a timely manner.