Our Client Journey

Introductory call

Our free intro call connects you with one of our advisers to explore your goals, answer initial questions and see if we're the right fit to support you with your financial journey.

Discovery Meeting

This is a one-hour meeting, held online or in person, where we get to know you better, understand your goals, values, and priorities, and explore how we can best support you.

Fact Find Meeting

In the Fact Find Meeting, we gather detailed information about your financial situation, goals, and concerns. This helps us build a personalised strategy tailored to your unique needs and circumstances.

Advice Presentation

In the Advice Presentation, we share our tailored recommendations based on your goals and financial position. We explain your personalised strategy in detail, answer questions, and ensure you feel confident moving forward.

Implementation Meeting

In the Implementation Meeting, we take action by putting your personalised financial plan into motion, setting up accounts, lodging paperwork, and ensuring every detail is aligned with your agreed-upon strategy and goals.

Ongoing Support

We provide ongoing support with regular reviews, life-stage planning, legislative and investment monitoring and open communication, ensuring your financial plan adapts confidently as life changes and opportunities arise.