Your financial advice journey

What to expect from your first enquiry to implementation

Start with the right information

Many people underestimate just how much groundwork goes into working with a financial adviser. It's not only the meetings and advice, it's gathering information, reviewing documents, confirming details, completing forms, verifying identities and staying on top of timelines. Then, there's the back-and-forth: clarifying questions, updating records, and making sure everything is implemented correctly.

In short, the "work" behind the scenes is often bigger than it looks, and the quality of the outcome depends on getting those admin steps right.

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Care. Knowledge. Trust.

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Before your first meeting

1

Reach out

We begin our journey when you reach out to us for financial advice.

2

Complete your Fact Find

Before your first meeting, we require your Fact Find documentation to be completed and returned to us prior to booking your initial meeting.

3

Book your consultation

Once we receive your completed Fact Find information, we will schedule your initial meeting.

Your initial meeting and next steps

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An obligation-free consultation

Please allow a minimum of two hours for the meeting and plan to remain available for the full duration.

If you choose to proceed

Financial advice is more than facts and figures. Advisers complete a substantial amount of work before implementation can even begin.

Accordingly, it is essential to promptly prioritise your adviser's requests for information and actions, including verification of identity and required signatures. Any delay may result in additional administrative steps and increase the overall cost of implementation.

Making It Official:
Next Steps & The Fine Print

Once your initial consultation is complete and you choose to move forward, we officially kick off the teamwork behind the scenes.

Great financial advice is built on a mountain of careful prep work long before your strategy can actually be put into action. To make sure your plan gets moving as smoothly and safely as possible, here is how we can work together on the final stretch:

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Prioritising the details

We will occasionally reach out for signatures, document confirmations, or identity verification. Treating these requests as a priority helps keep your journey on track.

Understanding timelines

Client delays can require us to repeat administrative steps or update figures, which can increase the overall time and cost of setting up your plan. Additionally, external providers (such as super funds or insurance companies) occasionally make administrative errors; if this occurs, we may need to return to you to clarify details, re-confirm information, or even resubmit documents adding further delay. Your prompt communication and support with paperwork are the single best ways to counter these delays and keep your plan on track.

Our Commitment to Security

Safeguarding your financial and personal data is our priority. We only request information that is strictly necessary to meet rigorous regulatory standards, and our team will guide you through every step, keeping the process as seamless and secure as possible.