

OUR PROCESS

Fact Find and FSG

1. Complete your fact find

Proposal and Invoice

2. Prepare our proposal and quote

Strategy Call

3. Conduct our research and modelling

SOA Presentation

**4. Produce your Statement of Advice
(SoA)**

Document signing

5. Implement the Recommendations made in the SoA

Annual Review

**6. Review and Revise the Plan at Regular Intervals, or when
Circumstances Change.**