

WEALTH ARCHITECTURE™

The Briefing Stage™	Your Priorities Survey™
	Our Foundation Analysis™
	The Planning Dialogue™

The Design Strategy™	Focussing on Objectives™
	Exploring the Options™
	Proposing the Solutions™

The Solutions Meeting™

The Construction Process™	Integrating the Team™
	Making It Happen™
	Reporting on Progress™

The Maintenance Program™	D. I. Y. Maintenance™
	Standard Maintenance™
	Superior Maintenance™
	Bespoke Maintenance™

The Briefing Stage™

Your Priorities Survey™ helps you assess your current situation and identifies your future goals and objectives. Completed and returned, enabling us to prepare **Our Foundation Analysis™**, forming our initial thoughts and agenda for **The Planning Dialogue™**. In this meeting we will establish your goals and aspirations and agree the features you wish to incorporate in your **Wealth Architecture Program™**

The Briefing Stage™ is at our expense.

The Design Strategy™

This addresses your goals, objectives and aspirations and considers how to achieve these through various alternatives. Using our knowledge, expertise and skills, we deliver a personalised wealth plan, which simplifies our creative recommendations.

The Design Strategy™ is at a pre-agreed fee

The Solutions Meeting™

This is an important step in understanding and agreeing the way forward based upon our strategic ideas and solutions.

The Solutions Meeting™ is at our expense.

The Construction Phase™

Combining our resources with other professionals (where required), we ensure a smooth implementation of the agreed recommendations. We will keep you informed and liaise with you throughout the process.

The Construction Process™ is at a pre-agreed fee.

The Maintenance Program™

D I Y Maintenance™

No retainers or other regular fees, work will only be undertaken at your request. Each item of work will be chargeable as detailed in our schedule of fees.

Standard Maintenance™

A monthly retainer fee is payable, we will keep your file up to date and you will benefit from an annual review statement, meeting and reasonable telephone support.

Superior Maintenance™

A monthly retainer fee is payable, we will keep your file up to date and you will benefit from semi-annual, or more regular review meetings, quarterly statements and unlimited telephone support.

Bespoke Maintenance™

A monthly retainer fee will be agreed based on the amount of work involved in the Bespoke Maintenance Program which will be individually designed for you and will include Superior Maintenance above.