

WEALTH ARCHITECTURE™ PROCESS



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 Phase™	Integrating the Team™
	Making It Happen™
	Reporting on Progress™

The Maintenance Programme™	D. I. Y. Maintenance™
	Standard Maintenance™
	Superior Maintenance™
	Deluxe 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 and efficient implementation of the agreed recommendations. We will keep you informed and liaise with you throughout the process.
The Construction Phase™ is at a pre-agreed fee.

The Maintenance Program™

D I Y Maintenance™
No regular fees; work will only be undertaken at your request. Each item of activity will be chargeable as detailed in our schedule of fees.

Standard Maintenance™
A monthly fee is payable; we will keep your file up to date and you will benefit from a biennial review statement plus meeting and reasonable telephone support as well as our regular newsletter.

Superior Maintenance™
A monthly fee is payable; in addition to the above, you will benefit from an annual review statement plus meeting and more telephone support as well as an occasional email newsletter.

Deluxe Maintenance™
A monthly fee is payable; in addition to the above you will benefit from two review meetings per annum and a statement each year, and more telephone support as well as pro-active management of your financial planning.

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