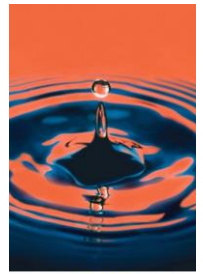


# WEALTH ARCHITECTURE™ PROCESS



ANAND  
ASSOCIATES  
WEALTH ARCHITECTURE

<b>The Briefing Stage™</b>	Your Priorities Survey™
	Our Foundation Analysis™
	The Planning Dialogue™

<b>The Design Strategy™</b>	Focussing on Objectives™
	Exploring the Options™
	Proposing the Solutions™

<b>The Solutions Meeting™</b>
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<b>The Construction Phase™</b>	Integrating the Team™
	Making It Happen™
	Reporting on Progress™

<b>The Maintenance Programme™</b>	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.