

# The 12 Point Financial Health Check

## 1. Your Issues

An update by you on issues requiring attention

## 2. Strategic Review

An update by your adviser on recommended changes to strategy

## 3. Investment Review

Looking back on the last 12 months performance

## 4. Investment Action Plan

Looking forward & implementing any changes to investment strategy

## 5. Debt Review

Reviewing your interest rates and debt structuring arrangements

## 6. Taxation Update

Reviewing opportunities & threats created by changes to taxation law

## 7. Pension Update

Reviewing opportunities & threats created by changes to pension law

## 8. Insurance Review

Providing a check of current levels of cover & policy wording

## 9. Estate Planning Review

Ensuring your estate planning wishes are current & legally valid

## 10. The Remove The Hassle Service

Sorting through any paperwork received that confuses you

## 11. Family Review

Discussing any financial issues affecting your family

## 12. Professional Update

Providing professional updates to your accountant & other advisers