

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 past 12 months performance
4	Investment Action Plan	Looking forward and implementing changes to investment strategy
5	Debt Review	Reviewing your interest rates and debt structuring arrangements
6	Taxation Update	Reviewing opportunities and threats arising from changes to taxation law
7	Pensions Update	Reviewing opportunities and threats arising from pensions law
8	Insurance Review	Providing a check on current levels of cover and policy terms and conditions
9	Estate Planning Review	Ensuring your estate planning wishes are currently legal and valid
10	Removal of Hassle	Sorting out any relevant paperwork that confuses you
11	Family Review	Discussing any financial issues affecting your family
12	Professional Update	Providing professional updates to your accountant and other advisers