

INVESTING IN YOURSELF

We share ideas

***“Lifestyle Financial Planning is a process, not a product.
It is a delivery system for financial security.”***

Lifestyle Financial Planning is about you. It can help you:

- Reach your lifestyle goals.
- Create a better work/life balance.
- Create financial security.
- Live your lifestyle dreams.

Lifestyle Financial Planning can be full and comprehensive or it can be scaled to meet your most important needs.

To participate in the Lifestyle Financial Planning process you need to be ready and willing to take the time to **INVEST IN YOURSELF**. That means you need to do some preparatory work before we get together and then be ready to make a commitment to do the things that will help you reach your full lifestyle potential.

Lifestyle Financial Planning

Lifestyle Financial Planning helps you see when you can realistically expect to achieve lifestyle and financial goals. This could include things like:

- When can you retire or cut back your working hours.
- When can you buy a home or move to a newer home.
- When can you purchase investment assets such as shares and property.
- How will you meet the education costs for your children.
- When can you take that dream holiday. Or
- Any other financial lifestyle goals or dreams that you have.

I ask you to think of me as your financial planning coach. Just like a personal fitness trainer I will help you to understand the options and choices you have to get ahead financially, and then help to make sure you do the things to make it happen for you.

I can make this promise to you:

If you commit to and engage in this process you will come out the other side with a much better understanding of your current financial situation and a clearer idea of what your financial future might look like.

Let me ask you this question: - **Do you think you are worth investing in?**

Important information

This information is of a general nature only and is not intended to constitute personal advice. It does not take into account your particular investment objectives, financial situation or needs and, accordingly, you should consider the appropriateness of this information in light of your own circumstances. We recommend that you obtain professional advice before undertaking financial transactions.

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