

TFP...

FINANCIAL PLANNING

Your WealthGPS Roadmap & Financial Planning Proposal

DATE

The Start...

What is the purpose of investing your time in talking with us today?

Your Values...

Why is money important to you?

Personal Goals & Milestones...

What are your tangible goals that require money and planning to achieve?

Description	Target Date	What's Needed	Thoughts & Feelings When Goal Is Reached

Your Fears & Anxieties...

What don't you want your retirement to look like and are there things you have observed that you don't want to happen?

Where Are You Today?...

What is your current financial reality?

Cash	Property & Assets	Pensions & Investments	Protection	Income	Expenses	Debt

Notes...

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Family & Life...

Parents...

Empty rounded rectangular box for parents information.

Children...

Empty rounded rectangular box for children information.

Hobbies & Interests...

Empty rounded rectangular box for hobbies and interests.

Anything Else...

Empty rounded rectangular box for anything else.

Things To Think About...

A large, empty rounded rectangular box with a dark grey border, intended for writing notes or thoughts related to the 'Things To Think About...' section.

Your 3 Month Action Plan...

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Our Service & Fees...

We charge transparent fixed fees that are based on your unique situation and not a percentage of any assets you may have. The fees for our work together are:

Service	Fixed Fee
WealthGPS Planning & Strategy	
Advice & Implementation	
WealthGPS Ongoing Planning	

The WealthGPS planning & strategy fee is payable by invoice or can be deducted from invested funds if we progress to advice & implementation stage.

The advice & implementation fee is payable either by invoice or more commonly is deducted from invested funds once we have completed our work and presented this to your satisfaction.

Our WealthGPS ongoing planning fee is typically collected from invested funds but can also be paid via standing order. This fee will not increase with assets as and when you may invest more, however we do reserve the right to increase this fee with CPI and review every 2 years.

Our Financial Planning Guarantee...

If you feel we have not delivered on your objectives and completed work to your standards, then we will waive our fee. No questions asked!

There is no commitment to progress past the planning stage. If you feel that you have got enough from the work we do up to that point you will be given a copy of the work we have carried out, including your plans for you to implement and manage yourself.

Our Promise...

1. We will align your money and time with your most important goals and deeply held values.
2. We will get your financial house in perfect order and keep it that way forever.
3. You will have a level 10 confidence that no matter what happens in the markets, the economy, or the world you will achieve your goals.

The Next Steps...



To a happier, healthier and wealthier retirement...

Dan Haylett



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**"Giving you the confidence to spend
money & time on what's most
important"**

TFP...

FINANCIAL PLANNING



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Helping you enjoy and embrace the **freedom of**
life after work...

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