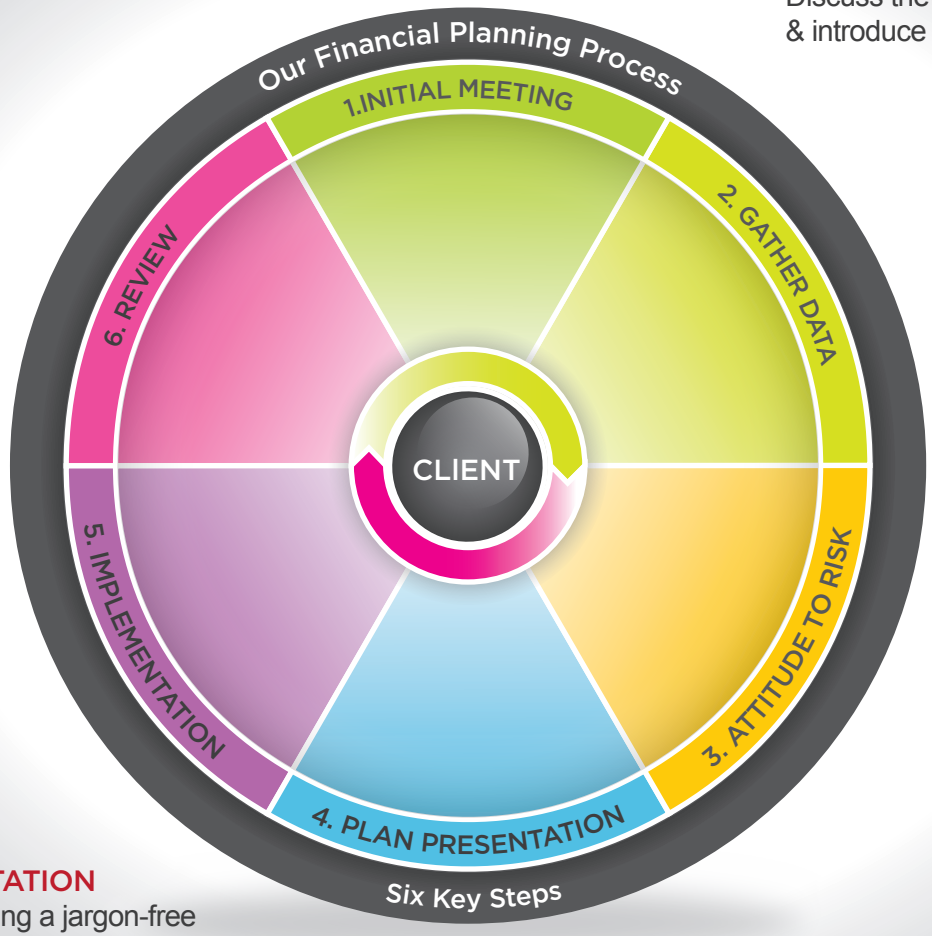
Our Financial Planning Process involves six key steps

PHFS
Wealth Management



1. INITIAL MEETING
Discuss the client's lifestyle goals & introduce the services we offer

2. GATHER DATA
Gather data to ensure we undersatnd all of the facts

3. ATTITUDE TO RISK
Ascertain the level of risk the client is willing to accept, using our Finametrica Questionnaire

4. PLAN PRESENTATION
Present the Plan, using a jargon-free explanation & addressing all of the clients queries or concerns

5. IMPLEMENTATION
Implement the agreed plan, using our online system

6. REVIEW
Review the plan on an ongoing basis, meeting with the client at agreed time intervals

Working With You To Achieve Your Lifestyle Goals