

The Key Benefits of Financial Advice

Are you getting the help you need?

GREENARCH
WEALTH MANAGEMENT



Financial Planning

- | | |
|---|--------------------------------------|
| Regular Planning Meeting | Planning for the unthinkable |
| Ad hoc meetings for important decisions | Prioritise financial opportunities |
| Agree your goals | Unlimited access for money questions |
| Forecasting how much money you need | Second opinion service |
| Lifestyle funding in retirement | Outsourced financial administration |



Investments

- Make sure your money works hard
- Matching your investments to your risk profile
- Monitoring investment performance and risk
- Consolidation of investments
- Regular updates on investment markets
- A bodyguard between you and product salespeople



Tax Planning

- Minimising the tax you pay
- Proactive, not reactive, tax planning
- Education on legislation changes
- Tax-efficient estate planning



Behavioural

- Removing stress by providing clarity
- Helping you avoid regrets
- A "don't do that" service
- Support during volatile markets
- A voice of reason during emotional decisions



Other

- | | |
|---|---------------------------------|
| Someone who cares as much about your financial future as you do | Independent sounding board |
| A co-ordinator between all your professional advisers | Support for a surviving partner |
| Thinking partner | Lessons from other clients |
| Scam avoidance | Financial project manager |
| Referrals to other professions | |



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