

# **KEY ATTRIBUTES OF A LIFE CENTRED PLANNER**

## **A LIFE CENTRED APPROACH**

Our purpose is to help you achieve the best life possible with the money you have. We will work in partnership with you, putting your life at the centre of our conversations. We will take time to understand **YOU**, your background, philosophy, needs and objectives so that we can help you put your money to good use. In so doing, we strive to provide you with a better Return on Life not just a better return on your investments.

## **ORGANISATION**

We will help you get your financial house in order and help keep it that way. We will help provide for your lifetime income and expenditure needs and your tax planning, investments, protection and estate planning.

## **ACCOUNTABILITY**

We help you follow through on your commitments by working with you to prioritise your goals, show you the steps you can take and regularly review your progress towards achieving them.

## **OBJECTIVITY**

We provide insight to help you avoid emotionally driven decisions in important money matters. We are available to consult with you at key moments of decision making, doing the research to ensure you have all the necessary information.

## **PROACTIVITY**

We work with you to anticipate your life transitions and to be financially prepared for them by regularly assessing what is coming and creating the action plan to address and manage these transitions ahead of time.

## **KNOWLEDGE**

We explore the specific knowledge needed for you to succeed by first thoroughly understanding your situation, then providing the resources to help with your decision making. We explain the options and explore the risks associated with each choice.