

# essentiallyfinancial

*planning for life*

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## **BIG PICTURE**

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- Establishing your real objectives
- Maintaining independence
- Preserving capital

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## **FUTURE STRATEGIES**

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- Ensuring tax effective income
- Health issues

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## **FAMILY OFFICE**

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- Wealth planning
- Reviewing your will
- Minimising inheritance tax
- Use of trusts
- Estate assets

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## **INVESTMENT PRINCIPLES**

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- Market research, evaluation and analysis
- Short, medium and long term
- Alternative investments
- Rebalancing portfolios

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## **STRAIGHTFORWARD COMMUNICATION**

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- Clear explanations
- More effective decision making
- Taking control

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## **REMOVING THE HASSLE**

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- Taking the complexity and hassle out of administration
- Second opinion

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## **PROFESSIONAL SUPPORT**

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- Providing updates to your accountant or other professional adviser
- Supplying end of year taxation information
- Recommending suitable professionals as needs arise

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## **ANNUAL REVIEW**

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- In-depth face to face annual review meeting

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## **PRIORITY RESPONSE**

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- Telephone and email access to your adviser
- Face to face access with your adviser between review dates

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