

Understanding Financial Planning



Step 1 Understanding Financial Planning

The role of our advisers is to help you achieve your financial goals.

In order to assist you understand more about what Financial Planning is, we have detailed each step of

[Find out More](#)



Step 2 Initial Meeting

At your first consultation, we will discuss your current situation, identify your needs and establish your go



Step 3 Your Financial Plans

One of our experienced financial planners will prepare a financial plan that explains the strategies we are recommending.

The plan will set out the strategies that have been specifically designed to help you achieve your financial goals.



Step 4 Implementation of your Plan

Once you are comfortable with your financial plan and the recommendations, we will help you with its implementation.

We will provide you with the necessary paperwork and follow up on any outstanding issues.



Step 5 Keeping track of your financial performance

Monitoring and reviewing your portfolio will largely determine its success.

We will track the performance of your financial plan and inform you of its progress on a regular basis.

We will also continue to work with you to ensure that your changing needs and circumstances are met.



Step 6 Contact Financial Horizons

This is where you can tell us something of your financial situation, what is important to you and what you

[Contact Financial Horizons TODAY!](#)

Please note that any information you provide is secure and will not be passed on to any other party.



Step 7 We will contact you

Upon receipt of your enquiry, we will provide you with a Financial Services Guide.

If you have submitted the online form, thank you. Our Office will contact you shortly to talk to you about t