

FINANCIAL PLAN

PREPARATION

- 01 COOPERATION SET-UP**
This will be the beginning of the fun way to your longterm prosperity
- 02 ESTABLISHING FINANCIAL GOALS**
We will open the door to your happy future together
- 03 ANALYZATION OF THE FINANCIAL SITUATION**
We will map all of your resources to make a financial balance sheet

REALIZATION

- 04 PRESENTATION OF THE FINANCIAL PLAN**
We will show you how money can work for you
- 05 APPROVAL OF PRESENTED SOLUTIONS**
Our priority is to you understand everything, there is no rush to find quick solutions
- 06 MAKING STEPS ACCORDING TO THE PLAN**
With our help, you have the certainty of not making wrong decisions

CHECK

- 07 OPENING AN ONLINE ACCOUNT IN OUR CLIENT'S PORTAL**
Everything will be under your control instantly and anywhere
- 08 UPDATE OF THE PLAN REGULARLY**
We don't leave room for coincidence therefor your plan will be revised whenever needed
- 09 YEARLY BALANCING MEETINGS**
You will get professional care, as we say: "What's looked after improves faster"