

## You've made an appointment to see a Financial Coach

### What happens next?

By making an appointment to see a Financial Coach you've taken an important step that will help you take control of and maximise your financial wellbeing.

#### What happens at the meeting?

1. At your first meeting we'll explain who we are, how we operate, our range of services, the relationships and associations we have and all our fees and charges.
2. We'll also ask you questions about your current financial situation and lifestyle goals. This is an important part of the process, so being prepared and bringing along the required information is key to making your meeting a success. All the information that you provide to us will be kept strictly confidential at all times.
3. We'll then make an initial assessment of the information you give us and use this to go through a number of different ideas and strategies that may cut down the time needed to reach your desired lifestyle. We'll also assess whether or not you're on track to meet your lifestyle goals.
4. At the end of our first meeting you'll be invited back for a second meeting where we'll give you our recommendations and actions needed to implement them.
5. At the end of the second meeting, if you agree to proceed with our recommendations we'll help with the implementation of our recommendations and arrange to meet with you regularly to review your plan to ensure it remains current and on track.