

FINANCIAL PLANNING

UNDERSTANDING YOUR REQUIREMENTS

We must understand your requirements, your values, and your life goals so that we ensure that your financial planning is aligned with what you want to achieve.

In this stage of your financial planning we like to have personal discussions so that we fully appreciate what you want. However, we have also found that our clients get a lot more out of our discussions if they have given this area some thought before we meet.

Your Values & Life Planning

We have prepared a unique set of tools to help you, and most of our clients find that these are invaluable in helping them to decide what they want.

- Please start with identifying your 'Core Values' and 'Life Balance: The Wheel of Life' and let us know when you have completed them.
- It is recommended that you complete the 'Life Goals' exercise online and send us a secure message on PPF to notify us that you have finished them.
- Your 'Bucket List' should be an ongoing thought process and it has been prepared so that you think about what you want to achieve and experience this year and beyond.
- Many clients like to complete the 'Life Planning' questions as well though you can leave them until we meet if you wish.

For more information, call: **0121 554 4444** or email: enquiries@interface-ifa.co.uk www.interfacefinancialplanning.co.uk