YOUR FINANCIAL REVIEW
UPDATES & CHANGES

We believe that it is time for us to review your financial planning to ensure that everything is progressing according to plan. We are currently updating and noting how any changes in the regulatory and market environment may have affected you.

Please log into your PFP account and review and update any changes in your circumstances

The majority of your investments and bank accounts update automatically from the links to the providers so the update should only take you a few minutes.

In order to help you we have created a document called: 'PFP Profile - adding and updating your information' which is available in the PFP Documents section or available from our website.

Our review meetings usually cover the following main areas below but if there is any specific area that you would like to discuss please let us know in advance so that we can ensure that we have everything ready.

Life Goals review & discussion

- What have you been doing since we last met?
- Have you ticked anything off or added anything to your bucket list?
- A review of your life goals responses.

Financial Planning

- Your Life Time Cashflow Model - is it on track?
- DIscuss your model and consider alternatives - Your 'What Ifs?'
- What improvements, adjustments or changes you can make.
- Are you a too much, too little or just right person?

Financial Advice

- Your Investment report, market discussion & review.
- Do you need to take any action or make adjustments?

Meeting Specifics

- Items that have been identified beforehand for discussion or attention.

Anything Else

- Open discussion about any other matters to be considered.

Where?

The way that we conduct a review is always your choice. Some clients prefer a series of shorter telephone meetings, whereas others prefer to meet us face to face so please ensure that we know your preference. Using modern technology, you may like to try our easy to use screen sharing facility where clients enjoy their review from the comfort of their own homes. If you choose this option you will find it amazingly easy to use and we will be glad to help you if you need it.

When?

We anticipate being ready for your financial review within the next few weeks. Please let us know if there any dates and times over the next few weeks which you would prefer.

If you prefer you can choose your own time just click the book an appointment online link at the bottom of this email or by going to our website at https://interfacefinancialplanning.co.uk/ clicking the **Schedule an Appointment** box at the bottom left of the screen. This facility allows you to choose up to three alternatives.

Interface

V1.0