

How Advice is Provided

There are a number of key stages involved in the advice process with clients having complete control and discretion over proceeding further at every stage:

Discovery Meeting

Choosing an adviser is a decision we expect clients to carefully consider. An initial meeting provides an opportunity to have some initial questions answered and for the adviser to understand what your financial goals may be.

Proposal

Following an initial meeting, we will issue to you a proposal documenting the areas in which assistance can be provided with an estimate of costs and timeframes for the provision of formal advice.

Advice Presentation

Upon agreement to the proposal, work is commenced to fully research, investigate and analyse the strategies and options available. We prepare an official Statement of Advice or Strategy document detailing our chosen recommendations that is then presented face-to-face.

Advice Implementation

Should the advice document recommend changes to your financial arrangements, it will also detail the administration required and any fees should you elect for Paris Financial to implement the changes on your behalf.

On-going Service

It is important to discuss with your adviser the most appropriate and affordable levels of ongoing support to keep you on track to achieve your financial goals.

Should regular ongoing support be agreed, Clients can choose between two service options Gold Service Package and Platinum Service Package.

Our **Gold Service Package** consists of:

- Portfolio analysis and reporting every 6 months
- Yearly Face-to face strategy meetings
- Portfolio advice formally supplied and then implemented each year
- E-Newsletter and regular market updates
- Liaison with other professional advisers on your behalf

Our **Platinum Service Package** consists of:

- Portfolio analysis and reporting every 3 months
- Half-yearly face-to-face strategy meetings
- Portfolio advice formally supplied and then implemented each year
- E-Newsletter and regular Market Updates
- Liaison with other professional advisers on your behalf

An individual service agreement will be supplied for your consideration once the extent of ongoing needs are fully established.

Paris Financial

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