SCHEDULE OF SERVICES

01 ADVICE SERVICES

The Financial Life Planning Service	An evaluation of what you really value, what you really want now, and in the future. Then together we create a personalised Financial Plan to achieve your lifetime aspirations.
The Investment Planning Service	Creating an effective investment portfolio that matches your personal needs, and accurately reflects how you feel about risk.
The Retirement Planning Service	Carefully creating a bespoke retirement plan to deliver the security and Financial Freedom that you deserve.
The Cash Flow Projection Service	At last! Accurate forecasting and cashflow modelling that tells you the truth about your financial future!
The Protection & Risk Review Service	A detailed analysis of your needs and current arrangements to protect those most important to you in the event of unforeseen tragedy.
The Pre-Retirement Service	A review of your existing pension arrangements within five years of retirement to give a better understanding of how the future looks.
The Annuity Review Service	A comprehensive analysis of your annuity options at retirement to meet your personal needs and maximise your future income.
The Shopping Bag Service	A comprehensive review, organisation and analysis of your collection of financial policies and arrangements gathered over the years.
The Tax & Trust Service	A review of your tax and trust arrangements to ensure that they are organised to minimize taxation liabilities and to preserve and distribute your wealth according to your wishes.
The Mortgage Analysis Service	A comprehensive market report to allow you to make an informed decision on which mortgage solution best suits your needs.

02 MONITOR & REVIEW SERVICES

Annual face-face meeting.	✓
6 monthly telephone review.	✓
Telephone and email access to your Account Manager.	✓
Priority response service - phone and emails returned with 24 hours.	✓
Cashflow Projection – Monitor and Review.	✓
A pre-meeting questionnaire to update all your personal data and financial position.	✓
A review of your risk profile to ensure that your attitude to investment markets remains the same.	✓
An annual report covering all your investments and insurance for which we are the appointed advisers.	✓
A new mini financial plan.	✓
Automatic prompting and transactional assistance for any implementation advice scheduled for you by your planner.	✓
Liaison with other professionals on your behalf including your accountant, stockbroker and legal advisers. We also have a strong referral panel that may be able to assist you if you do not already have access to these professionals.	✓
Insurance and investment placement, including assistance with implementation and confirmation of the transaction.	✓
Portfolio Valuations emailed on request or as agreed.	✓

Imagine Financial Planning Windsor House, Cornwall Road, Harrogate HG1 2PW
Telephone: 01423 527 944 **Email:** enquiries@imaginefp.com **Web:** www.imaginefp.com