Client Service Calendar

A financial planning process designed to help you make informed money decisions with confidence.

Tax Year-End Planning
February

To ensure that you have the opportunity to make full use of the tax deductions available to you, we will pro-actively consider what additional investment contributions you are willing and able to make before the end of the tax-year.

Cash Flow & Investment Planning Review
May/June

This review meeting provides an opportunity to review your investment planning and portfolio to ensure that it is still appropriate for your desired lifestyle.

We will review your investment contributions, make provision for upcoming expenses, and update any projections.

It also gives us an opportunity to understand whether life changes or upcoming transitions require a change in your planning.

Tax Season Update
July

To ensure that you are prepared for the tax filing season we will summarise the information you will require and attach any relevant tax statements.

This can be sent on to your tax practitioner or used to submit your tax filing yourself.

Estate & Risk Planning Review
October/November

This review meeting provides an opportunity to review your "human insurance" to ensure that you and your family will be provided for in the case of an unforseen event.

We will review all benefits to consider whether they remain appropriate.

We will also review your Wills, beneficiary nominations, and other estate planning considerations to ensure that your assets will be distributed appropriately and efficiently on your death.