You made an appointment to see a financial coach. What happens next?

By making an appointment to see a financial coach you have taken an important step that will help you take control of your financial wellbeing.

What happens at the meeting?

1. At your first meeting we will explain who we are, how we operate, our range of services, the relationships and associations we have and all fees and charges.

2. We will also ask questions about your current financial circumstances and your lifestyle goals. This is an important part of the process so being prepared and bringing along the required information is the key to making this a success. All the information you provide will be kept confidential.

3. We will then make an initial assessment of the information you give us and use this information to go through different strategies and ideas that may cut down the time needed to reach your desired lifestyle. We will also assess whether or not you are on track to meet your lifestyle goals.

4. At the end of our first meeting you will be invited back for a second meeting where we will explain and give you our recommendations and the actions needed to implement these recommendations that will help in achieving your goals.

5. At the end of the second meeting if you agree to proceed with the recommendations we will help with the implementation of the recommendations and arrange to meet with you regularly to review your plan to ensure it remains current and on track.