



Client Care Program

At Values to Vision Financial Planning (V2VFP) we help people make sense of their money, by implementing sound financial strategies that guide them toward their goals in life. We help our clients to define "*the end*" as they want it and then we help them work on "*the means*". This is financial life planning.

A financial plan is only valid for one day because tomorrow might change everything. Every day of our lives we learn something new. Every day of our lives, life "happens" to us. Aspirations and visions change over time, as people change. So we work alongside you to help you navigate through these life changes with the **V2VFP Client Care Program**.

A vital part of our offering to you, the **V2VFP Client Care Program** provides ongoing financial life planning to our clients via a comprehensive review service, ensuring your values and visions remain congruent over time.

The V2VFP Client Care Program

An Annual Review Meeting With Your Adviser Including

- Re-evaluation of your goals and visions
- Full update on your life over the previous 12 months
- Complete review of your financial strategy
- Adjustments to your portfolio to ensure integrity & alignment with your long-term goals
- Sign off on rebalancing of portfolio back to agreed investment strategy
- Triennial risk re-profiling & new portfolio selection if necessary

Unlimited Telephone & Email Access To Your Adviser

Unlimited Face-to-Face Access To Your Adviser Between Review Dates

The Professionals Service

- Providing strategic & financial updates to your accountant & any other professional advisers
- Supplying end of year taxation information (as required)
- Recommending suitable professionals as needs arise
- Communicating clearly & openly with all of your professional advisers, to ensure consistency, clarity & focus on your desired outcomes

The Portfolio Construction Service

- Construction of portfolios based on scientific risk profiling methodology
- Risk profiling every three years
- Modern Portfolio Theory applied to ensure your risk-adjusted portfolios capture maximum potential returns
- Access to institutional funds normally not available to individual investors

The Portfolio Management Service

- Online access to portfolio valuations
- Portfolio monitoring
- Annual re-balancing of portfolio to agreed financial plan investment strategy
- Written portfolio valuations on request

The Priority Response Service

- Phone calls & emails returned within 24 hours without fail

The Remove The Hassle and Stress Service

- Taking the complexity & hassle out of administering your financial affairs
- Helping to purge you of the endless paperwork each year
- A voice of reason to help you keep your head when all around you are losing theirs
- Empowering you to see through the relentless financial pornography

The Taxation and Planning Service

- In conjunction with your accountant & other taxation advisers