

Your Financial Future – Made Simple and Achievable

What if your money worked as hard as you do?

I'm **Naomi Haynes**, a **Chartered Financial Planner and Fellow of the Personal Finance Society**, with a passion for empowering people to take control of their finances. I offer down-to-earth, easy-to-understand financial advice to help you build a future that gives you and your family freedom, security, and the life you've always dreamed of.

Whether you want to retire earlier, spend more now, or save for later, we'll create a tailored financial plan that aligns with your goals, dreams, and values.



Introducing: Strategic Financial Planning Sessions

Our **Strategic Financial Planning Sessions** are the first step toward achieving the financial future you dream of.

It's a two-part service, with each meeting lasting around 1–1.5 hours. Together, we'll explore where you are now, where you want to be, and how we can get you there:

Before the first meeting: You'll complete a straightforward questionnaire about your current finances—what you earn, spend, own, and owe. This sets the foundation for mapping out your financial journey.

First meeting: We'll start by reviewing your current financial situation together—your starting point on this journey. Then, we'll dive into your goals, priorities, and dreams, from the near term to your later years. Together, we'll explore what matters most to you and your family, setting clear and achievable objectives for your financial plan.

Second meeting: Using powerful, specialist cashflow planning software, we'll visualise your financial options.

- Can you retire earlier?
- Could you spend more now?
- Are you ready for life's surprises?

This isn't just numbers on a page—it's your personalised financial plan taking shape before your eyes.

Why Clients Love This Service

- ✓ **It's empowering:** See your financial future clearly, with options tailored to you.
- ✓ **It's collaborative:** We work together to create a plan that evolves with your life.
- ✓ **It's visual:** Our forecasting software shows you how your decisions today impact your tomorrow.
- ✓ **It's actionable:** You'll leave with recommendations that are achievable, understandable, and designed to work for you.
- ✓ **It's ongoing:** We can work together to put your plans into action, helping to turn them into reality, while keeping them on track and adapting them as life changes.

Think of me as your financial PT

Just like a personal trainer creates a workout plan tailored to your body and goals, I create a financial plan tailored to your money and dreams. You've worked hard for your money—now it's time to get it working hard for you.

And just like in fitness, this isn't a one-size-fits-all approach. Your plan is yours, designed to fit your life. And as life changes, we'll tweak the plan together to keep you on track.

Let's Start Your Journey

Want to take control of your finances?
Book your Strategic Financial Planning Sessions today.

☎ Call me to find out more: 01707 938 600 / 07785 530 555

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Together, we'll create a plan to help make your goals a reality.

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FINANCIAL PLANNING



Associate Partner Practice

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