YOUR JOURNEY WITH MANDERS

MANDERS FINANCIAL SERVICES

OVER **10 YEARS** IN BUSINESS

Our motto: ENJOY TODAY, PLAN FOR TOMORROW. But what does that mean?

It is our mission to ensure our clients can get on with having their best life now, whilst we work in the background to understand their goals and create an ongoing action plan to work towards achieving them. Here's what we mean:

Solve your urgent need and create peace of mind

Most people come to an adviser with an immediate concern that needs tackling. We're here to help, and whilst the team address the urgency, we also start to get to know you. Our advisers are here to support you throughout your life and review your situation as a whole to help you get on track to reach a financially secure future.

Understand your world and priorities

Who is in your world? Who is important to you and also dependent on your financial success? What are your immediate goals, those in five or ten years time, and in later life? Our advisers work with you to understand your priorities for now and in the future.

A robust and flexible plan for life

We take your current financial situation and your dreams for the future and build an actionable plan to help you achieve them.

Annual reviews to spot opportunities to grow your wealth

Milestone events, government policies and a changing family will trigger the need to review and adjust your financial plans. That's why our annual planning meetings are so essential to your financial security.

YOUR FINANCIAL PLAN ISN'T SHORT TERM, IT'S FOR LIFE.

A financial adviser's role is to work with you to build the right plan sharing their expertise – but as importantly be able to add changes along the way as your life evolves, adjusting to create the best outcomes for you and your loved ones.

OUR COMMITMENT TO YOU

- To be available if you have any queries at any time.

- To ensure we make contact at least annually for your review, unless agreed otherwise.

- To ensure that we are aware of any legislative changes that could impact your financial planning including tax changes.

YOUR COMMITMENT TO US

- You will respond to our invitation for your annual review.

- You will ensure we are kept up to date with your objectives, circumstances and future goals.

On behalf of Manders Financial Services:

Signed ______________________

Date ______________________

Your Name:

Signed ______________________

Date ______________________