

Financial Review Offer

We are delighted to be able to offer you this financial review. Below provides details with regards to this offer along with what you can expect from your financial review offer.

This financial review will provide you with an initial summary report. This is not a comprehensive financial review, just a summary guide to some key considerations in relation to your financial portfolio.

Discovery

The first step is to ascertain your financial needs and your plans and objectives. We will gather details of the current financial investments that you have.

Research

Once we have a detailed understanding of your financial objectives and goals, we'll review your current investment and savings portfolios against these objectives along with your current attitude to risk and capacity for loss. We will then look at the performance of the current portfolio against the benchmark.

Summary Recommendations

We will provide you with a summary report of our findings along with comments on the areas that require addressing. We will then provide you with a guide as to any costs if you decide that you would like to engage our advisers to help you to achieve your goals.

The Next Steps

We do hope that your summary report provides you with the assurance of our financial adviser's expertise. If you decided to appoint us, we would then expand the work done above to provide a comprehensive recommendation report and then meet with you to discuss this in more detail to ensure we deliver and meet your future financial objectives and goals.

Our advisers and support team would then arrange all necessary steps to ensure your decisions are implemented thoroughly, accurately and timely.

fbwealth.co.uk
info@fbwealth.co.uk
0333 11 222 11

 **Forrester Boyd**
WEALTH MANAGEMENT