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12 Point Financial Planning Agenda:

1. Main Issues - An update on issues requiring attention
2. Cash Flow Analysis - Are you on track to achieve your financial objectives
3. Investment Review - Looking back on last 12 months investment performance
4. Strategic Review - Recommended changes to strategy and or asset allocation
5. Action Plan - Implementing agreed changes
6. Debt Review - Reviewing your debt arrangements (mortgage)
7. Taxation Update - Reviewing opportunities & threats caused by changed to taxation legislation
8. Pension Update - Reviewing opportunities & threats caused by changed to pension legislation
9. Estate Planning Review - Ensuring your Estate Planning wishes are current & legally valid
10. The Remove the Hassle Factor - Sorting through any paperwork received that confuses you
11. Family Review - Discussing any financial issues affecting your family
12. Professional Update - Providing updates to your accountant & other professional advisers