

THE WEALTH MANAGEMENT PROCESS™



THE LIFETIME FOCUSER MEETING™

The Lifetime Focuser document is completed prior to the meeting to clarify your circumstances allowing us to ensure you receive real benefits and value from your meeting. **Free of charge.**

THE DISCOVERY MEETING™

This meeting is designed to clearly clarify your goals, worries and concerns and how exactly we can assist you. We will outline how your assets can be effectively protected and managed. **This meeting is a fixed fee.**

THE WEALTH MANAGEMENT PLAN

The plan will identify your priorities and discuss your objectives; the specific recommendations will be designed to fully remove your worries and concerns in each area. **Pre-agreed fee.**

THE PLANNING MEETING™

An optional meeting to discuss and review your plan prior to implementation. **Free of charge.**

THE IMPLEMENTATION PROCESS™

A meeting or meetings to implement the chosen recommendations within your individual plan. All work is completed with all commissions being paid to you. **The pre-agreed fee will be outlined within your plan.**

CUSTOMER OR CLIENT

Following implementation we will discuss and agree your requirements to monitor your plan.

All regulated activities are undertaken by Stratton Annette's Limited which is an appointed representative of Financial Limited, which is authorised and regulated by the Financial Services Authority.

Non regulated and generic work is undertaken by Stratton House Limited.

THE
STRATTONGROUP

Create, Manage & Protect your Wealth

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