FINANCIAL PLANNING: STEP 5 OF 5

# IMPLEMENTATION

WHAT

Client Activity

WHEN

Months 6+

## GOALS

- ✓ Carry out your financial plan using your new know-how and plan manual.
- ✓ Recognize financial and life events that may require a plan “tune up”.

## WHEN SHOULD I GET A PLAN “TUNE UP”?

Life is anything but predictable. We provide clients with long-term advice, coaching, and financial planning across all life events and milestones, keeping your plan relevant and effective.

It may be time to collaborate again if:

- You’re getting married, divorced, or have suffered the loss of a spouse or partner.
- You’re nearing retirement and want advice on next steps.
- You have inherited funds and want to make the most of the opportunity.
- You’ve changed or lost your job, or are considering a career shift.
- You’re considering a consequential purchase or sale (e.g. vehicle, home, business...)
- It’s been a couple of years and you want to confirm you’re still on track.



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