



INDEPENDENT
WEALTH
Partners

The intangible benefits of independent financial advice.

Sometimes the value that we provide as independent financial planners is tangible - we can specifically point to some tax savings that have been made, some social security that has been gained or some investments that have delivered gains. However, more often than not the value can be intangible. Our clients often tell us that the following 6 intangible benefits are the ones they value the most from our relationship.

Organization: We will help bring order to our clients financial life, by assisting them in getting their financial house in order (at both the “macro” level of investments, insurance, estate planning, taxes, etc., and also the “micro” level of household cash flow).

Accountability: We help our clients follow through on financial commitments, by working with them to prioritize their goals, show you the steps they need to take, and regularly review their progress towards achieving them.

Objectivity: We bring insight from the outside to help our clients to avoid emotionally driven decisions in important money matters, by being available to consult with them at key moments of decision-making, whilst doing the research necessary to ensure they have all the information. As we are independent it is clear to the clients we are working in their best interests.

Proactivity. We work with our clients to anticipate their life transitions and to ensure they are financially prepared for them, by regularly assessing any potential life transitions that might be coming, and creating the action plan necessary to address and manage them ahead of time.

Education. We explore what specific knowledge will be needed to succeed in their situation, by first thoroughly understanding their situation, then providing the necessary resources to facilitate these decisions, whilst explaining the options and risks associated with each choice.

Partnership. We attempt to help our clients achieve the best life possible whilst working alongside them, not just for them, to make this possible, by taking the time to clearly understand their background, philosophy, needs and objectives and offer transparency and independence around our own costs and compensation.