financialaspects

Financial Aspects is a **family-based** business servicing the Greater Geelong Area, Bellarine Peninsula and the Surf Coast. With over **40 years' experience** in financial planning, and with Ron Rose senior at the helm, Financial Aspects opened its doors in 1991. **Jodi** and **Dan** joined the company in 2003 and 2000 respectively and took over the business in 2008.

We believe that your **financial journey is your own and your goals and strategies should also be unique to you.** That is why a financial plan developed by Jodi and Dan at Financial Aspects will be **tailored specifically to you and your situation** and not a generic cookie-cutter plan for the masses.

financial planning process

Regardless of your stage in life, your income, or your goals, we believe a financial plan can help you better manage your finances.

Short term goals, long term aspirations, monthly expenses, investments, taxes and insurance all come in to play. With so much at stake, it just makes sense to develop a plan to manage your financial world. Also, with the complexity of options and decisions, we feel an experienced and knowledgeable professional can help you greatly.

You can expect your plan to reflect your personal financial situation, address the issues most important to you, become a "blueprint" for your future, be flexible and adaptable, and be something you can implement.

our process

6 **REVIEW**
Regularly review your plan to ensure it continues to be relevant

5 **IMPLEMENTATION**
Implement strategies and recommendations

4 **PRESENTATION & EDUCATION**
Present your personalised plan and explain each component

3 **RESEARCH & DEVELOPMENT**
Research your options and develop your financial plan

2 **GATHER**
Collate all your financial information

1 **LISTEN & DISCOVER**
Getting to know you

financial **planning process**

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process steps

1. LISTEN & DISCOVER

(60 – 90 min session)

Getting to know you! Understand what's important to you, your situation, aspirations and concerns and determine if we can help you.

2. GATHER

(60 – 90 min session)

We will work with you to gather and collate all your financial information to help us develop an accurate and meaningful financial plan specifically for you.

3. RESEARCH & DEVELOPMENT

(3 – 6 hours)

We will research financial options and potential strategies tailored specifically for your situation to develop a financial plan that helps you achieve your financial goals.

4. PRESENTATION & EDUCATION

(60 min session)

We will present you with your personalised financial plan and clearly explain how our recommendations will help you achieve your goals. We will take the time to explain all of your financial options. Together, we can then confirm our strategy to move forward to the next stage.

5. IMPLEMENTATION

(30 – 60 mins)

We will arrange to implement the recommendations made in your financial plan with your permission.

6. REVIEW

(90 mins)

Should you decide to engage our ongoing services, we are here for you whenever the need for advice arises. Because your life is dynamic and always changing, your financial plan may need to change too. We will offer to meet with you on a regular basis to help you remain on track and adapt your plan to overcome new challenges as they arise so you can confidently manage your goals and live a fulfilling life.

our fees

Statement of Advice Preparation:	**$3,300** minimum (complex advice may increase this fee)
Insurance Advice:	**$5,500**
Aged Care Advice:	**$3,850 – $6,600** depending upon requirements

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