

SECOND OPINION SERVICE

What & How?

Not everyone wants to move their financial advice service or has ever thought about engaging with an advice process. We understand and respect that decision.

But at the same time, it's not unusual for people to want a second opinion about their financial plan, and the solutions they've implemented - in fact, studies have shown that 80% of high-net-worth individuals would welcome a second opinion on their finances.

Our Second Opinion Service is a **no cost, no obligation** review of your current financial situation and your goals and objectives for the future.

Initial Call



Our initial 15 minute phone call will help us both decide if we are a good fit for each other, to ensure you are getting the service you need. If not, we are happy to introduce you to someone who may be better suited for you or point you in the right direction.

Discovery Meeting



The goal of this meeting is to ensure we are really clear on your values, goals and objectives in life and to get a strong understanding of your financial situation.

Following this meeting, we gather information on any existing plans and policies and set to work on producing a unique and personally tailored report for your situation.

Investment Plan Meeting



During this meeting we will explain, in plain English, exactly what you need to do to achieve your financial goals and how it is that we feel we can help you. This includes presenting our investment strategy and your personally tailored report in full detail.

Mutual Commitment Meeting



If you decide to go ahead, this meeting will allow us to answer any further questions you may have before we get started. After this meeting we will start to implement your investment strategy, as agreed with you.

If you are still not happy with our recommendations at this stage and feel like we will not be a good fit, then that is ok. You are free to leave the process without any pressure or cost to you at any stage.

Who?

Due to the service we offer and the size of our team there could be times where our service will not be the best fit for you and your requirements. We are more than happy to have an open initial discussion and if this is the case then we will be able to point you in the right direction or put you in touch with someone who we feel can help with your situation more effectively.

When?

To request a free second opinion please feel free to give us a call on 0117 33 22 626 or email info@ifamax.com

Protecting your wealth for a secure retirement