CLIENT PROCESS

Structured approach

CWB. It's more than just financial advice

1. Discovery Meeting

Introduction to our services and advice process. We discuss your goals, objectives, attitude toward investment risk and possible solutions.

2. Research & Analysis

If both parties elect to proceed, we will research and analyse your current situation. We use this to formulate our recommendations.

3. Recommendations

We host a meeting to present your strategy and product recommendations (Financial Plan). The plan will restate your objectives and agreed risk profile.

4. Mutual Commitment

We will agree the Financial Plan and seek mutual commitment on the way forward. Next steps will be discussed and prioritised.

5. Implement Plan

We will commence implementation of our recommendations. This involves liaising with existing providers and setting-up any new policies.

6. Monitoring & Review

Regularly review the Financial Plan. Ensure the advice remains consistent with your needs and changing circumstances. Monitor investment performance.