

TAKE CONTROL OF **YOUR FINANCIAL LIFE.**



SALT FINANCIAL GROUP

TAKE CONTROL OF YOUR FINANCES

THE FIRST STEP is being aware of your goals, short and long term.



We understand that everyone is at a different stage in life and have personal 5, 10, 15 and even 20 year targets. Allow our "Financial Road Map" guide you to better understand the services required to reach your targets and map out your ideal future lifestyle.

<p>YOU YOU</p> <p>What you would personally like to achieve? Do you have a particular interest you would like to spend more time on?</p>	<p>YOUR FAMILY</p> <p>What is important to your family? Is it financial security, planning for the future or protecting what you already have?</p>	<p>YOUR RETIREMENT</p> <p>Are you ready for retirement? Have you thought about what lifestyle you'd like to maintain and how you will be able to achieve it?</p>	<p>YOUR MONEY</p> <p>How can you be better with your money? Do you know where your money is going? Do you know when you will have enough to fulfil your goals?</p>
<p>YOUR LIFESTYLE</p> <p>How important is your lifestyle to you? What do you prioritise above all else - travel, work life balance, assets?</p>	<p>YOUR HOME</p> <p>What is important to you about your home? Are you looking to renovate, relocate or downsize?</p>	<p>YOUR CAREER</p> <p>What are your career goals? Change career path? Planning on promotion? How would you cope if you were made redundant?</p>	<p>YOUR BUSINESS</p> <p>What is important to you for your business? Are you looking to grow or go?</p>
<p>YOUR HEALTH</p> <p>You are your most valuable asset, are you prepared for the future?</p>	<p>YOUR COMMUNITY</p> <p>How involved do you want to be in your community?</p>	<p>YOUR DREAMS</p> <p>Is there something special that you have always wanted to do but never thought you could?</p>	<p>TECHNOLOGY</p> <p>Is your adviser connected in real time to your financial information?</p>



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CREATING YOUR FINANCIAL ROAD MAP to create your personalised plan.



Take note of your current lifestyle, career, wants and goals for the future.
What areas of your life do you think you have under control? What areas need attention?

YOU	YOUR FAMILY	YOUR RETIREMENT	YOUR MONEY
YOUR LIFESTYLE	YOUR HOME	YOUR CAREER	YOUR BUSINESS
YOUR HEALTH	YOUR COMMUNITY	YOUR DREAMS	TECHNOLOGY

<p>Your current lifestyle, career and future wants.</p>	<p>UNDER CONTROL</p>
	<p>NOT UNDER CONTROL</p>

No two clients are ever the same. Here are some typical client situations

<p>Mr & Mrs Smith</p> <p>This couple are both in full time employment & have no children. They enjoy an active lifestyle and are very social. They have their careers or businesses sorted but would like own their own home. They are looking for some advice on asset protection, budgeting and planning for their futures.</p>	<p>UNDER CONTROL</p> <p>NOT UNDER CONTROL</p>
<p>Mr Jones</p> <p>Mr Jones has recently retired. He owns his own home and is comfortable that his family is protected and the future planned for. He would like some advice on his lifestyle in retirement, how he can become more involved with charities he is passionate about and planning for his future residential requirements.</p>	<p>UNDER CONTROL</p> <p>NOT UNDER CONTROL</p>
<p>Ms Anderson</p> <p>Ms Anderson has grown up children who have left, or soon will be leaving, the family home. She has a successful career and is now starting to think about the future. She would like advice on how to best manage her money to maintain her lifestyle. She would like to make sure she is adequately insured against life's unknowns and also wants to start planning for her retirement.</p>	<p>UNDER CONTROL</p> <p>NOT UNDER CONTROL</p>

TAKE CONTROL OF YOUR FINANCES

YOUR FINANCIAL ROAD MAP



YOUR CURRENT LIFESTYLE, CAREER AND FUTURE WANTS.

UNDER CONTROL

NOT UNDER CONTROL

 YOU



YOUR FAMILY



YOUR RETIREMENT



YOUR MONEY



YOUR LIFESTYLE



YOUR HOME



YOUR CAREER



YOUR BUSINESS



YOUR HEALTH



YOUR COMMUNITY



YOUR DREAMS



TECHNOLOGY