

Navigator Financial Planning

Mutual Commitment Experience

'introducing successful entrepreneurs to smart advice'

Discovery Stage

Process Outline
Navigator & Segment7 Overview
Client Profile Interview
Our Investment Philosophy
Introduction to Toolkit
Terms of Business

Mutual Commitment Stage

Review Objectives
Proposal Summary
Your Investment Policy
Confirm Attitude to Risk
Agree Next Steps

On-Boarding Stage

Strategic Planning Solutions (eg):

- Entrepreneur Wealth Plan
- Portfolio Performance Optimiser™
- Business Cash Optimiser™
- Financial 360™
- Business exit strategy
- Tax Planning
- Estate Planning

- Introduce Review Process

Guidance | Trust | Confidence

www.navigatorFP.com

www.segment7.co.uk

www.ebisgroup.co.uk

our personal service company
our business intelligence network
our investment philosophy

