

SWM FINANCE MATTERS

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DISCOVER
YOUR
WEALTH





THE ADVICE JOURNEY

-  Meet with you
-  Collect all the information we need from you
-  Help you identify your goals and current financial position
-  Consider strategies and issues, then develop written recommendations
-  Discuss these recommendations with you
-  Implement the agreed recommendations
-  Help you review your objectives, financial situation and needs

WORKING TOGETHER

We passionately believe our clients deserve to be happy and to have the opportunity to achieve their goals and aspirations.

We understand between family, work and social commitments not everyone has the time to organise and manage their finances.

Life is a fabulous journey. Having time to spend and protecting the ones you love makes all the difference.

We can help create that time.

SETTING GOALS

Beginning with the end in mind provides direction and clarity.

No matter how much we earn, we all wish we could save more.

For most people, the first step to saving more, is to set some realistic and achievable goals and actually putting a strategic plan in place.

LEARNING MORE ABOUT YOU

Our first meeting will also be among our most important, you will leave this meeting with enough information to make an important decision about your financial future.

Everything we do going forward is about what's right for you. We provide personalised financial solutions to show that whilst building wealth it is still possible to enjoy a great lifestyle.

YOUR ADVICE & SUPPORT

Our focus is entirely based on what you want to achieve and the lifestyle you are currently living. Quality financial advice can help you reach your life's aspirations and achieve what makes you happy.

Whether we have provided "comprehensive" or "specific" advice it is important that your plan is reviewed and updated on a regular basis.

Our ongoing relationship focuses on making changes as your circumstances change throughout your life.

