INSIGHT financial partners

delivering your lifestyle

The Insight Process

At Insight, our knowledge and experience has allowed us to develop a step by step financial planning process. This process will allow us to create the best financial strategy for you, which is tailor-made to your financial and personal needs and goals. We have detailed our steps below.

Step 1. Prior to Our First Meeting

Before our face to face initial interview we contact you to familiarise you with the financial planning process and what we will require to help you attain your needs and goals. At Insight, our expertise spans from superannuation and investments to estate planning and wealth protection. So depending on what you would like us to help you with, we require documentation, such as statements that covers your financial circumstances. This information is imperative to enable us to provide you with accurate, holistic and prompt advice.

Step 2. Getting to Know You

During our initial meeting we endeavour to get to know you, and for you to get to know us. At this meeting, your Adviser will discuss your financial and personal needs and goals, and how we can help you achieve these. We will also give you with a background about who we are, the services we offer and the likely cost for our services. This information will be provided to you in our Financial Services Guide. If we think that we can help you achieve your goals, we will ask you to help us fill in a Financial Needs Analyser, which will help us determine your financial background and your perception to risk.

Step 3. Discussion of Strategy

After our initial meeting, your Adviser will develop a strategy specific to you that will assist you to meet your financial and personal goals. At this meeting we will present to you our vision of how we can help you accomplish your ultimate ambitions. This meeting is interactive hence the strategy developed will be tailor-made to you and help us develop an overall strategy that you are happy with. Should you wish to proceed with the strategy presented to you, we will ask you to engage our services by completing a Terms of Engagement Letter. This outlines an agreed fee for the services we promise to offer you.

This meeting will involve your Adviser formally presenting your strategy in the form of a Statement of Advice (SoA). This document will guide you through a strategy designed specifically for you and will illustrate to you how each of your financial and personal goals can be attained. Moreover, the advice document is easy to follow and will provide you with a step by step process of how we will work together to implement your strategy.

Step 4. The Application Process

After the presentation of the plan, our Client Services Administrator will walk you through the steps of implementing your plan. We will look to implement your plan straight after the SoA presentation. We will be there to help you complete application forms and ensure that all information is correct to allow for a seamless application process.

Step 5. Final Confirmation

Throughout the implementation of your financial plan we will continue to keep in informed with the progress of your applications. Once completed, you will receive a Confirmation Letter, which details the transactions, applications and implementation of your plan as per the original Statement of Advice.

Step 6. Total Financial Care

At Insight we are focused on ensuring that your strategy is adaptable as you move through the various stages of life. Once your strategy has been implemented and your investments are placed we would like to continually review your financial and personal situation to ensure that the original strategy recommended is still right for you in meeting existing and new goals. Your annual review service is to ensure that you remain on track to achieving your goals and provide you with peace of mind.

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