



MODULUS
FINANCIAL PLANNING

Your Journey With Us



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Hello.

Welcome to Modulus FP

Working with a financial planner, especially if it's the first time you have ever worked with one, can seem daunting. Proper financial planning takes you on a journey where you discover more about yourself and your family, and how your money fits into the overall picture.

We've created this handy document to explain our process and what your journey with our financial planners might look like.



1. Initial Call

 10 minutes

One of our friendly team will be in touch with you to book in a face-to-face meeting with one of our advisers here at Modulus. We will ask you some questions to get a better understanding of your situation and whether we are best placed to help you.



2. Discovery Meeting

 60 - 90 minutes

In our first meeting with you, our financial planner will get to know more about you and what you're hoping to achieve. We will make some detailed notes and try to get a deeper understanding of what makes you tick, as well as taking a look at your current financial situation and how things look at the moment.

After the meeting, we will send you a bespoke Financial Planning Proposal which details what we will do and expected costs. Once you have agreed to work with us, we will move to the next stage.



3. Homework

We will ask you to complete and sign some documents so we can collect the necessary information from you and your providers to build your personal plan.



4. Research

Once we have everything back from you and your providers, we conduct some thorough research to identify any gaps in your situation and explore fully how your current situation matches your goals.



RADIO SILENCE: During this period, you may not hear back from us as much as usual. Rest assured we are working on your behalf to do some research. If anything changes, we will be sure to keep you in the loop.



5. Financial Planning Meeting

In this meeting, we'll present the first draft of your financial plan using our cashflow modelling software, giving an overview of your current situation. We'll review the plan together, making any necessary adjustments, and explore different scenarios to ensure you're on track to meet your goals.

This is your opportunity to ask questions, make adjustments, and ensure the plan reflects your needs and preferences before moving forward.



6. Recommendations

In this meeting, we'll present our tailored recommendations based on your financial goals, risk profile, and current situation.

We'll walk you through the proposed strategies, explaining how they align with your objectives and the rationale behind each recommendation.



Completion!

Over the course of the next few weeks, we will work on your behalf to make sure all of our recommendations are implemented appropriately. We will keep you in the loop when anything changes and make this as simple as we can for you.

With everything set up, you are now a client at Modulus!



Every Year - Regular Planning Meeting



60 - 90 minutes

Life changes, and so a good financial plan needs to be regularly updated to ensure it remains relevant. Your financial planner will hold a Regular Planning Meeting with you at least every 12 months to ensure this is the case.

At these meetings, we update your plan in the midst of any changes that may have occurred, plan for your future and take a look at the last 12 months and how things have gone.



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