Our advice process

Hillcrest Financial Services
Quality advice

Introductory meeting (one hour)

The first step in our advice process is to arrange an introductory meeting. This meeting provides the opportunity to discuss your current situation and requirements, as well as your goals for the future. We can also explore how we may be able to help you.

Commence research and modelling (6 - 8 hours)

7 - 14 days

Should you wish to engage our services, our work begins on reviewing and assessing alternative financial models and investment scenarios appropriate to your needs and circumstances.

Strategy development (12 - 14 hours)

Development of the detailed strategy and recommendations and preparation of your personalised plan (Statement of Advice document).

Strategy presentation meeting (one hour)

14 - 21 days

At this meeting we will present your tailored financial strategy and explain how our advice and recommendations will help you to achieve your goals and aspirations.

Implementation of advice (8 - 10 hours)

Once you are comfortable with our advice and recommendations, the next step is to implement the detailed strategy as outlined in the Statement of Advice.

Post Advice Meeting (one hour)

1 - 2 months post implementation

At this meeting we will provide you with a confirmation of the strategy set up, allow for questions and to help you set up electronic access to see your new investments.

Ongoing advice and regular reviews (ongoing)

Ongoing

To ensure your financial strategy remains on track to meet your objectives (as they are subject to change over time), we will meet on a regular basis to review the performance of your investments and make any necessary adjustments that may be required.

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