Establish our tems and agree on areas of advice

 Monitor the implementation and actions on a regular basis

> Six Step Financial Advice Process

2. Gather the facts and identify your needs

5. Present our written recommendation and implement for you  Analyse and research your circumstances to develop a strategy

Prepare your written
 Statement of Advice

# **Six Steps To Financial Fitness**

Zhe Xu

Six Steps To Financial Fitness:

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