Strategyfirst

INDEPENDENT FINANCIAL ADVICE

The Value of Advice: *Beyond the Numbers*

Helping clients build confidence, make better financial decisions, and achieve the life they want.



Independent financial advice provides more than investment recommendations. It delivers clarity, accountability and peace of mind through every stage of life.

Beyond the Numbers

Strategyfirst
INDEPENDENT FINANCIAL ADVICE

Having a financial adviser in your corner is about more than investment returns. While growing and protecting your wealth is important, the value of quality financial advice extends far beyond the numbers.

A good adviser offers expertise, guidance and accountability to help you navigate important decisions, stay focused on your goals and feel more confident about the future.

From saving you time and simplifying complex financial matters, to supporting your family's long-term needs, the true value of advice lies not only in your investment outcomes, but in the confidence, clarity and peace of mind it can bring.

Competence

"I DONT REALLY KNOW WHAT I'M DOING"

Investment selection
Asset allocation
Financial planning
Risk management
Tax considerations
Estate planning

Continuity

"I WOULD LIKE MY ENTIRE FAMILY TO BE INVOLVED"

Spouse involvement
Children engagement
Multigenerational planning
Legacy
Philanthropy

Convenience

"I DON'T WANT TO SPEND TIME ON THIS"

Time savings
Coordination of other professionals
Personalised service
Investment monitoring
Rebalancing

Coaching

"I NEED SOMEONE TO KEEP ME IN CHECK"

Peace of mind
Education
Adherance to plan and goals
Emotions, biases and stress
Objective feedback
Trusted second opinion
Life/business transition

**Source - Dimensional Fund Advisors*