



CLIENT NAME
ONE PAGE FINANCIAL PLAN

June 2022

Primary Goals

- Find the confidence to leave the corporate world knowing that your financial future is secure
- Move back to the UK and own a home with some land
- Work part time and focus more on charitable work
- Support parents in their retirement

Cash Flow Planning

- Get clear on what is coming in and what is going out
- What would your ideal life in the UK cost?
- Find a balance between investing and paying off mortgage
- Introduce structure and discipline to your monthly cash flow
- Maintain cash buffer – amount to be determined

Investment Portfolio

- Open Liberty Wealth investment account
- Invest portion of cash into portfolio of globally diversified companies
- Disciplined additions into portfolio monthly – benefit from dollar-cost averaging
- Full analysis of all pensions

Risk Management/Estate Planning

- Get a thoughtful Will in place
- Other estate planning documents (Power of Attorney etc)
- Life insurance review

Financial Organisation

- Documents uploaded into vault
- Put a system into place for accounts and passwords

Fees Charged by Liberty:

- Initial planning fee: US \$6,800
- Ongoing fee: 1% of assets under management (minimum annual fee of US \$5,000 applies from year 2)

Living for **TODAY** ☺ Planning for **TOMORROW** ☺ Growing your wealth **TOGETHER**