

# Retirement Funding Planning Process



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Forman  
Financial  
Services

# Overview



Develop plan and strategies that meet your personal circumstances.



Build and implement your portfolio and strategies.



We provide ongoing maintenance of the portfolio and strategies.



Design

Implementation

Maintenance

# Understanding Your Circumstances

We will gain a holistic understanding of your financial position and your retirement goals.

1

Your retirement funding  
assets

2

Your retirement income  
needs

3

Your investment risk profile



Design

Implementation

Maintenance

# Gap Analysis

Your current  
retirement income  
requirements

compared to

Your current  
retirement funding  
assets



Design

Implementation

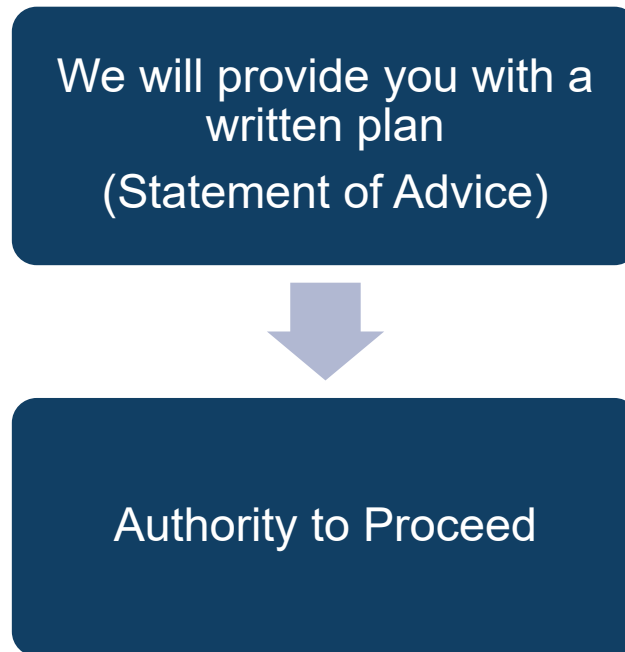
Maintenance

# Design Strategies





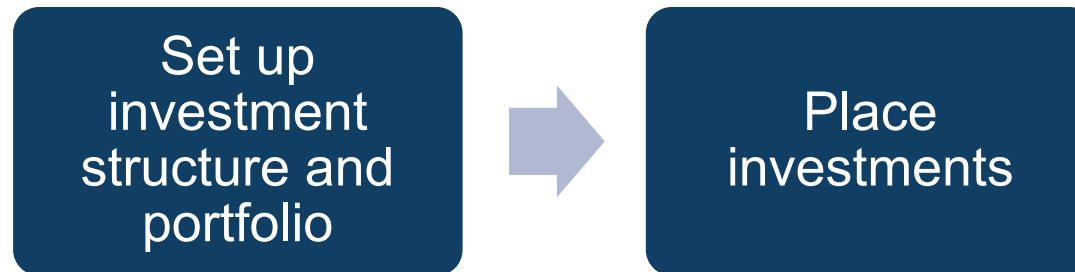
# Final Stage of Design





# Building Your Portfolio

Build and implement the strategy and portfolio in line with the Statement of Advice.



Design

Implementation

Maintenance

# Maintenance

**1**

Administration

**2**

Portfolio review

**3**

Changing circumstances





Design

Implementation

Maintenance

1

## Administrative Services

We will be your first point of contact for all administrative affairs relating to your portfolio.



Design

Implementation

Maintenance

## 2

# Portfolio Review

The review of the portfolio elements  
i.e. fund managers, underlying investments



Design

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# 3

## Changing Circumstances

### A

Changes due to market factors.

### B

Changes to your personal circumstances and retirement goals.

Going forward, once you have decided you would like to commence the process, we will begin the journey to your prosperous retirement.



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