Our Review Process

As an ongoing client of ours, you are invited to attend an annual review meeting, booked in by us (to ensure it happens!) with your updated financial plan for the year ahead. We'll also provide you with the following services:

Update & Review Your Lifetime Cashflow Plan

In these meetings, we'll cover:

- What (if anything) needs to change?
- Will you still have enough to be OK?
- Could you maybe spend more?

Review Your Investments

We do this constantly to ensure that they remain suitable, good value and will help you to achieve your goals.

Check Your Allowances

We check your ISA, Pension & Income Tax Allowances constantly to make sure they are maximised where possible, each and every year.

Manage Contributions & Withdrawals

We'll regularly manage your contributions and withdrawals from you pensions and investments, and implement any new ones, so that you don't have to.

red7fm.com simon.weeks@red7fm.com

Advice-On-Demand

No call centres, support tickets or queues.

You will get Simon's mobile and email to use as and when you need them.

Work with other professionals

We will liaise and work with your other advisers, such as accountants & solicitors when you need us to.

Or, we can introduce you to our panel of experts if required.

We are wholly Independent

We will regularly review the market to ensure your financial arrangements remain up-to-date, suitable and excellent value for money. No restrictions.

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