FINANCIAL ALIGNMENT PLAN

WEALTH IN HARMONY

BRADFORD
BESPOKE

DO YOU FIND THAT YOU CAN'T TALK ABOUT MONEY WITH YOUR PARTNER WITHOUT OPENING UP WOUNDS FROM THE PAST OF CAUSING CONFLICT?

- Are you being kept awake at night thinking about how best to use this money wisely?
- Is this money causing you and your partner to argue more than usual?
- Do you worry how this wealth will affect your family in the future or your friendship circles?

Do you want to:

- Ensure your wealth is working for you and reduce any potential friction when discussing money.
- Consider ways to preserve wealth to ensure it is passed on to future generations at the right time
- Make a meaningful impact in the world through charitable giving, but worried about how to make the most impactful donations.

If so,it's time to consider the
Financial Alignment Plan for affluent couples

THE FINANCIAL ALIGNMENT PLAN

- **Assess your life plans together as a couple, to build a shared vision for you and your family**
- **Understand how much you actually need as either a lump sum or monthly income to reach these goals**
- **Explore all wealth preservation options to provide diversity and tax planning benefits**
- **Look at patterns of financial behaviour that may have hindered you in the past.**
- **Make informed decisions about your next step, and move into your future feeling secure and financially aligned together.**

UNITY

Creating a safe space to come together and share deep seated money wounds

SHARED VISION & LEGACY

Openly discuss your vision for the future and get motivated for the future ahead

GROWTH & ENJOYING WEALTH

Feel in control of your wealth both internally and externally and understand the good it can bring

The Plan

DISCOVER

- **VALUES** - Identify your personal values and how they align with your financial goals.
- **WEALTH REPRESENTATION & DESIRE** - Understand your personal definition of wealth and what it means to you. acknowledging your emotions around money, both positive and negative.
- **FAMILY HISTORY** - Understand how your family's history with money has influenced your beliefs and behaviors.
- **WEALTH MINDSET** - Identify any limiting beliefs or negative patterns around money
- **COMMUNICATION** - Communicate and understand your partner's money beliefs and values to ensure alignment.

DREAM

- **SHARED VISION & MONEY VALUE**S - Develop a shared financial vision and ensure alignment with your values.
- **INNER & OUTER GOAL**S -Identify both external financial goals (e.g. retirement) and internal goals (e.g. peace of mind).
- **MONEY BELIEFS & A NEW MONEY STORY** - Respect & Acknowledge different money beliefs within your family.and write a new narrative for your money.
- **FAMILY FINANCIAL & EMOTIONAL INTELLIGENCE** - Develop emotional intelligence and improve communication skills around money with your family

DESIGN

- **FINANCIAL REVIEW & LIFE CYCLES**: Review all aspects of your current financial situation & identify where you are in your financial journey and what steps need to be taken to reach your goals.
- **SECURING YOUR FUTURE** - Ensure your financial security through proper planning and insurance.
- **MAINTAIN PURPOSE** - Create a legacy & philanthropy plan for leaving a legacy and giving back to your community.
- **TAX EFFICIENCY** - Understand how taxes impact your financial situation and take steps to minimize them.

DELIVER

- **WEALTH CREATION -** Develop a plan for increasing and preserving wealth through investments and other strategies.
- **STRESS TEST** - Regularly evaluate your financial plan and make adjustments as needed to ensute it can withdtand potential challenges.
- **ONGOING SUPPORT**

WHO IS THIS SERVICE FOR?

Our plan is tailored to meet the specific needs of wealthy couples, and working closely with them to understand their individual financial goals and objectives. We'll help create a comprehensive plan that takes into account both short-term and long-term goals, and we'll work to implement strategies that will help achieve them.

With our Financial Alignment Plan, you'll have peace of mind knowing that your joint wealth is being managed by experts who are dedicated to helping you achieve your financial goals.

Contact us today to schedule a consultation and learn more about how we can help you align your finances and secure your financial future.

ABOUT OUR FOUNDER, SAMANTHA BRADFORD

- Samantha Bradford is a Chartered Financial Planner and Fellow of the Personal Finance Society with over 22 years of experience advising private clients.

- She holds the highest level of qualification available in her profession, providing clients with the assurance that their finances are in safe hands.

- In addition, she holds the STEP Certificate for Financial Services and a Masters in Finance with a focus on the behavioral side of money. She is also a Certified Money Coach and Relational Financial Planner, bringing a unique set of skills and knowledge to help clients understand the deeper meaning of money and design long-term intergenerational solutions to preserve their hard-earned wealth for their loved ones.

Please contact me on 07887 832222