

How ISACO Works with You - the 5 Steps



ISACO
LET'S BUILD WEALTH TOGETHER.

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1. **Discovery** – Your goals, values and preferences

The process begins with a comprehensive fact finding session. Getting to know you as an individual is essential to helping you achieve your financial objectives. I will listen carefully to you and devote significant time and energy to understanding your needs and goals.

I will look at all aspects of your financial situation, including your risk tolerance, return objectives liquidity needs, time horizon, current holdings, financial experience and other factors.

2. **Strategy** – Linking capital growth with financial goals and opportunities

In the next part of the process, I will help you create an ISA and SIPP investment plan tailored to your personal circumstances.

I will demonstrate how ISACO aim to help you achieve your ISA and SIPP goals and save you thousands in unnecessary fees and charges. If at this stage you satisfied, together we will move onto the next step of the process called 'Implementation.'

3. **Implementation** – 'ISACO's Investment Guidance Service'

Once you are comfortable with your plan and all your questions about the service have been answered, we will introduce you to your own dedicated investment consultant whose job is to guide you in the simple set up process.

4. **Guidance** – Bespoke investment guidance from a UK leading growth fund investor

Attaining your investment guidance from a talented *investor* with a history of beating the stock market is a compelling proposition when the alternative is attaining guidance from an *adviser*. It's compelling because the statistics tell us 80-90% of advisers fail to beat the stock market.

5. Care – Dedicated personal assistance

ISACO's 'Investment Guidance Service' is very much about forging strong, long-term relationships. Dedicated personal assistance represents a deep intimate relationship which develops naturally over time. After coming on board, you are assigned an ISACO investment consultant who will tend to your every need. How you choose to communicate with your consultant is completely up to you. You can meet in person, by phone or online at the frequency you prefer.

Thank you for your time.

Yours sincerely,



Paul Sutherland
Managing Director

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