Matrix Planning Solutions Limited
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GPA Matrix Client Planning Process

Annual Review
- Snap Shot of your portfolio
- Revisit your plan
- Are we on track?
- Review strategy & solutions
- Risk Review
- Make any adjustments
- Agree on next review

1st Meeting
- Who we are
- How we operate
- How we get paid
- Agree on fees & systems
- All about YOU

Planning Process
- Analyse Information
  Evaluate Client Situation
- Develop strategy in line with clients goals
- Research products
- Discuss & check plan

2nd Meeting
- Revisit questionnaire
- Check Plan
  Brief Overview
- Plan in Detail
- Answer all questions
- Provide additional info
- Diarise next meeting
- Agree on review & monitoring periods

3rd Meeting (if required)
- Answer any questions
- Change draft if needed
- If agreement reached implement Plan
- Decide on review intervals

We Supply
- Copies of all documentation
- Additional Prospectuses
- Revised Plan if Required

In House Monitor & Review
- We log all information on our database
- We provide client seminars
- Email relevant messages and Information
- Investment Committee

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