

OUR APPROACH

'I feel I have gained a great deal from the entire Navwealth experience. We now have a detailed plan on our savings and overall long-term goals. It has been beneficial for us as individuals but also as a couple, we had an idea of where our life together was going but we now feel that we fully understand each others ambitions, dreams and fears and we understand and have agreed on the plans we have to address them too.'

– Claudia L, Navwealth Client

WHAT'S IT ALL ABOUT?

Discover, develop, deliver and deliberate, are ongoing stages in your wealth creation journey. Navwealth's four stages ensure you have a structured approach to reach your destination on purpose, and not by accident.



THE NAVWEALTH APPROACH



DISCOVER, the beginning of your journey and relationship with Navwealth. In our discovery meeting, we will determine your needs and goals. Understand your current circumstances, and most importantly, ascertain whether we're a good fit to work together.



DEVELOP, is where the magic happens. Behind the scenes, our team of financial specialists work together to design a strategy and a personalised plan to meet your needs and goals. Our recommendations are then presented, based on what will best suit you.



DELIVER, is where your plan comes to life. Our team of Accountants, Wealth Advisers, Mortgage Consultants and other Specialists, implement the recommended strategies. We take away the hard work and stress, and become the single point of contact between you and all of the financial institutions that make up your plan.



DELIBERATE, ensuring you remain on track. At this stage, we reflect and revise. We look at past performance, possible changes in your circumstances, and as a result, whether any changes are required to your ongoing strategy.



THE NAVWEALTH SOLUTION

Plans are not created or achieved overnight. Our process is unique and we know that it works. Our team of trusted advisers will work together and in conjunction with any other advice professionals to develop a plan which builds you a successful life and achieves your

financial and lifestyle goals. Your plan is one step in your continual journey, which will be monitored and amended to reflect changes in your goals or circumstances. When you partner with Navwealth, you will get a fresh and innovative approach to reach your destination on purpose.