

how often do you carry out a stocktake of your personal and business affairs?

Full Focus Limited
P O Box 33489
Takapuna, Auckland

t: 09 489 1650

f: 09 489 1650

e: enquiries@fullfocus.co.nz

w: www.fullfocus.co.nz

We often find that our clients' wealth planning and structures have been put in place in a very segmented way. Despite the professional expertise employed, no one has taken a complete overview of the situation. Nobody has looked at the "whole picture" and made sure everything fits.

Our Personal Stocktake provides just this. It is an indepth review of all the structures, methods and procedures you have (or don't have) in place to achieve what you want in your life. It is a frequent starting place for our work with clients. After all, if you don't know exactly where you are standing at the moment it's difficult to get valuable advice! If you don't know where you are "up to" it's almost impossible to move forward (in the right direction and confidently) to where you want to be!

Your investment in a Personal Stocktake is –

- An initial 2 hour interview to gather facts and documentation.
- Telephone conversations as required.
- A one hour meeting 2 weeks later to present your report.
This is a guideline only. We sometimes find during the initial 2 hour interview that more indepth conversation is required to do your job thoroughly.
- A set fee. Half payable on the day we start, and half on the day we finish (or within 2 weeks).

A Personal Stocktake will -

1. **Identify your personal and business goals, objectives, priorities and ethics.**

You'll identify the key relationships in your life, your family and your business. As well as identifying your goals and objectives in these areas, you'll also identify your values and attitudes, and the things that are important to you in life.

"If clarity and direction is required in any area of your life, it's well worth sitting down with Full Focus and discussing what you want to do and achieve. It's money and time well spent."

**C. Minson, Owner
Battery Masta Auckland Ltd
East Tamaki, Auckland**

This is a key ingredient to your Personal Stocktake. If you don't know what's important for you and to you, then we can't presume to know whether the structures you have in place (or not) are right for you.

2. Examine any structures you currently have in place.

The legal documentation and structures (e.g. your will, trusts, other personal and business agreements etc.) you currently have in place will be examined in detail. This will include financial structures or agreements, business and personal financial accounts as well as business structures (business plans, company structures etc.).

3. Check whether they do what they were set up to do.

Once your existing structures are identified, they'll be checked as to whether they -

- Fit with your objectives, priorities and ethics (as previously identified)
- Do what you think they do.
- Will achieve what you want them to achieve.

You will also be advised of -

- Any danger spots / "red flags"
- Where they clearly don't do the job they were intended to do.

4. Show you alternative methods and solutions.

You will be advised of any improved or different ways of structuring your affairs – so that they do what you want them to! You'll have alternative methods of creating certainty in your planning and structures.

5. Provide you with simple action plans to get you from where you are now to where you want (or need) to be.

You will have recommendations as to "where to from here". You will have clear options and steps to take, to get your wealth planning to where you want (or need) it to be. This information will be outlined in simple format, and presented in a report at the end of the exercise.

If you either –

- ✓ Have an above average income, or
- ✓ Are a controlling shareholder of a private business

Then a Personal Stocktake could be of benefit to you.

"We engaged Full Focus to have a look at our whole situation. In a very short period of time they were able to gather all the information on our business and general living situation. They put it in a simple format so we could understand exactly where we were. From there we could start adding or eliminating. This was a huge peace of mind."

"It is invaluable to have a company like Full Focus take an unbiased overview of your business and look and the whole picture. Professionals like Banks, Accountants and Solicitors can be left to deal with their specific jobs"

**C. Maxwell, Owner
Auckland Truck Spray Ltd
Onehunga, Auckland.**

If you'd like to discuss a Personal Stocktake further, just contact us -

David Martin or Kathy Martin

Phone: (09) 489 1650

Email: enquiries@fullfocus.co.nz

Or fill in the form below and post it to us at P.O. Box 33 489 Takapuna.

Please contact me to discuss a Personal Stocktake

Name

Postal Address

.....

Tel.

Mob.

Email