

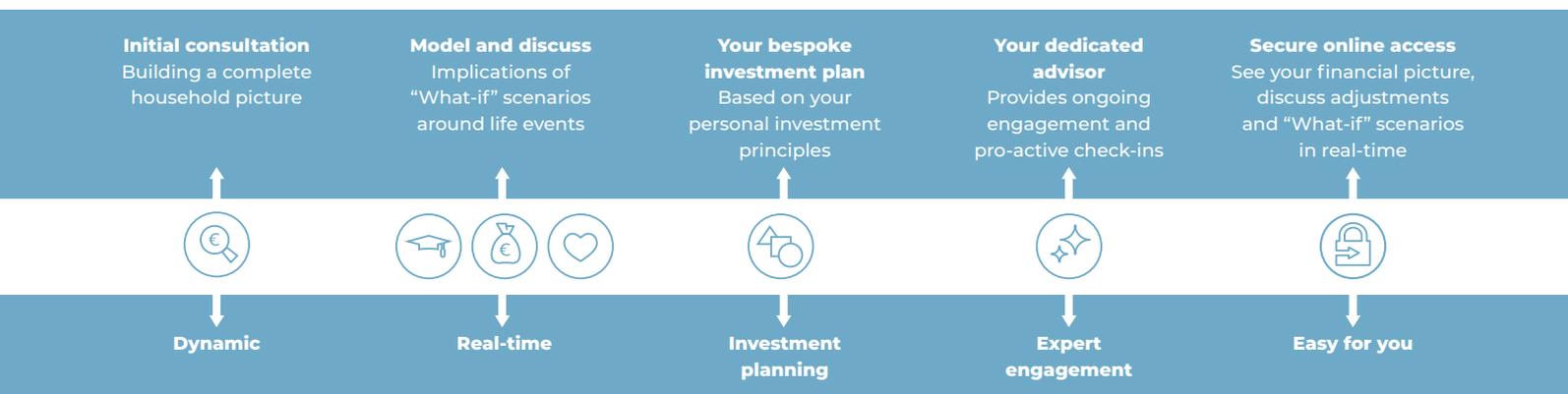
# AdvisorPro for Corporate Executives and Professionals

## Introduction to AdvisorPro

At Acuvest, we recognise how valuable your time is. Your work life is busy, and you want to maximise your time outside of work, spending time with your family and doing the activities you enjoy.

AdvisorPro is our **dynamic financial planning** service designed specifically to meet the needs of busy executives and professionals. It is a unique way for individuals to simplify, organise and optimise their household's financial future. It helps you focus on what you and your family would like to do in the years ahead, and to help you get the most out of life.

## How we work with corporate executives and professionals



## A dynamic approach to financial planning

The AdvisorPro approach enables you to get organised in your financial life. It helps you to streamline your finances and not waste precious time carrying out mundane financial tasks. But most significantly, AdvisorPro helps you to identify what is important to you in life and then builds a financial plan to help you achieve your goals, and to live your life to the full.

AdvisorPro also recognises that your life is constantly changing, and financial planning needs to be a dynamic process. With secure online access to your AdvisorPro plan, you can see your full financial picture at any time and have the option to test 'What-if' scenarios in real-time. Your dedicated Acuvest investment advisor is there to support you and to discuss each scenario. Your advisor will also proactively check-in with you once a year to review your plan.

## Key benefits of AdvisorPro

- Our holistic approach**  
 A complete household approach to financial planning with secure online access to every aspect of your finances.
- Simplify. Organise. Optimise.**  
 A simple and effective way to plan ahead for life's events and help you realise your life goals sooner than expected.
- Life is dynamic, not static**  
 Financial planning is usually a one-off event. Ours is a continuing service, with a proactive check-in every 12 months, revising plans on an ongoing basis.
- Finance life's opportunities**  
 Time is our most undervalued commodity. Make the most of yours by using the money you've worked so hard for, to finance what really matters to you.
- Be prepared for life's transitions**  
 Enjoy the peace of mind and improved sense of wellbeing, that comes with knowing you've future-proofed your finances.

## Acuvest's investment experience

For all our clients, their financial plan is underpinned by an appropriate and suitable investment plan developed by an investment professional. Acuvest is an independent, investment advisory firm providing independent advisory services to institutions, corporates, charities, and individuals – we advise our clients on more than €4.5 billion in assets and impact the futures of more than 40,000 households.

Our investment planning process brings this institutional investment expertise to enable you to achieve your personal and investment goals.

## Our 6 stage investment planning process to underpin your financial plan



*“I’ve got significant peace of mind and value from the time I have spent with the Acuvest team. They make it incredibly easy to bring a life’s worth of niggles and pieces of my financial jigsaw to the table and are helping me think through what I value most and how what I’m doing now in my career is going to deliver that for me.”*

A Digital Marketing Institute  
Executive

## Your annual check-in meeting

Your dedicated advisor will pro-actively check-in with you annually to discuss any changes to your circumstances. This review meeting will focus on:

- Your life goals
- Your investment objectives
- The economic backdrop
- Today's investment markets
- Your investment strategy
- Your retirement plan
- Your estate plan
- All related financial matters



## Our fee approach

At Acuvest, we offer quality, independent financial advice. We have no conflicts of interest within our processes and **we do not accept any commissions** from product or fund providers. We work only for you, and on a transparent fee basis that is agreed in advance.