

# The Importance of Regular Reviews

This document contains important information and you should read it carefully and keep it safe for future reference.



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## IMPORTANT INFORMATION

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**In the world of financial planning, consistency and adaptability are key to achieving your financial goals.**

Whilst annual reviews serve as a structured touchpoint and ensure that you maintain regular contact with your Financial Adviser, the dynamic nature of personal finance and global economic shifts necessitates more frequent interactions.

# Guidance when it matters most

Here are some of the key reasons why it's important to keep in regular contact with your Adviser and how the team at Lync Wealth can keep you feeling supported through your financial journey.



## Life happens fast

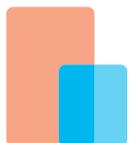
Life is unpredictable and ever-changing. From sudden windfalls to unexpected expenses, significant life events can occur at any moment and our goal at Lync wealth is to ensure that you can book in a meeting when a situation arises, good or bad, allowing you to address these changes promptly and ensuring that your financial plan remains relevant and effective.



## Tailored advice for unique circumstances

Annual reviews provide a broad overview that allows you and your adviser to delve deeper into specific concerns or opportunities.

Whether you're considering a significant purchase like a second home, contemplating a career change, or navigating tax efficient saving strategies, these targeted discussions offer guidance tailored to your unique situation.



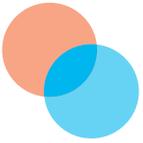
## Financial markets are dynamic

The global financial landscape is in a constant state of flux. Economic events, policy changes or market volatility can impact your investments and financial goals. Regular discussions with your Financial Adviser ensures that your portfolio is agile, responsive and aligned with current market conditions.



## Reinforces accountability

Regular check-ins foster accountability. Knowing that you have periodic meetings encourages proactive financial behaviour. It keeps your financial goals at the forefront, motivating you to stay on track and make informed decisions.



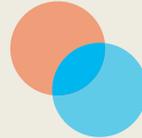
### **Adjustments for legislative changes**

Tax laws, maximum allowances and other financial legislations are subject to change. Ad-hoc meetings ensure that you're informed about these shifts and can adjust your strategy accordingly, maximising benefits and mitigating potential pitfalls.



### **Proactive problem-solving**

Addressing potential issues before they escalate is always preferable. Regular meetings allow for early identification of challenges, be it in your investment strategy, retirement planning, or estate management. Proactive solutions can then be devised, ensuring smoother financial navigation. In a world where change is the only constant, these additional consultations empower you to navigate challenges, seize opportunities and stay aligned with your financial aspirations.



Your capital is at risk. The value of your investment (and any income from them) can go down as well as up and you may not get back the full amount you invested. Past performance is not a reliable indicator of future performance.

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