Introduction to Lashley Financial

For the best life in your time

LASHLEY FINANCIAL

For our discussion

Who we are

Our philosophy

What we do

Our approach

Why choose us

Our process

This meeting

Who we are

- Professional services company
  - Personal financial services, including insurance
  - Education and training
  - Business consulting
- Founded by Michael Lashley
  - Successful corporate career, with a number of senior leadership roles
  - Over 20 years experience in management with 10 years in insurance and banking
- New company, in first year of operation

Our philosophy

Five key principles

People First

Respect for you and your business

Creating and Sustaining Relationships is our business

The relationship, not the sale, is our source of value

Service and Professionalism

Straightforward delivery, “can do” attitude, simple to do business

Education

We recommend - you determine what is right for you

Expertise and Experience

Real world solutions – not wish lists and theories.

What we do

Our goal: To create prosperity, through learning and action

Personal Financial Services: Knowledge-based services that allow customers to effectively use their financial resources to pursue their life goals.

Business Advisory Solutions: Knowledge-based services that improve business profitability and reduce business risks.

Education and Training Solutions: Learning environments and opportunities that create action and lead individuals to change their behavior to improve their lives.

Our Approach

Value First

Consensus on the value to be obtained from the relationship

Credibility

Demonstrating to you that we deliver what we promise

Confidentiality

Creating comfort for you that we protect your privacy

Independence

Knowing that we will act first and always in the your interest – not as an agent for another company

Integrity

Proving to you that we will act to earn your trust.

Why choose us

We are competent, experienced and customer focused

You can be assured that the solutions we recommend are the most appropriate for your circumstances and desires so you know that you have made the right decision for you and your family

We focus on establishing long-term relationships

You will recognise that we are in this with you, so you know that you and your business will be treated with the respect

We focus on “Client First”

You can feel confident that your needs will be properly identified and know that the decisions and actions you take are in your best interest

We seek to educate

You can use the knowledge you gain to properly assess recommendations and offers from providers and have better control over your financial decision-making

Why choose us

We are independent

You will receive objective advice, so that you can trust the solutions we recommend will be in your interest.

We have comprehensive financial planning software

You can have a clear view of your financial situation and the impact of your financial goals, which means you can make better decisions and choices about the direction that your future should take

We provide simple and practical solutions

We provide practical recommendations, explained in clear language, so you understand not only what we recommend but why.

We are creating a customer website

You will have easy access to the financial resources and tools you need, allowing you to simplify your financial affairs so that you have more time to focus on what matters most to you.

What we offer

Personal Financial Services

- Financial Education
- Financial Advice and Counseling
- Comprehensive Personal Financial Planning
- Single Need Planning
  - Retirement
  - Education
  - Investment
- Implementation Support
- Solution Sourcing
- Monitoring and Review

Our Process: Personal Financial Planning

“No Obligations Meeting”

- Assessing the fit
- Collecting detailed data

Analysis and Preliminary Assessment

- Where are you now?
- What are the issues and opportunities?

Presentation of Preliminary Assessment

- Agreeing what works for you and what does not

Development of Plan

- Comprehensive and focused on your needs and circumstances

Presentation of Plan

- What we are recommending to meet your financial goals

Plan Implementation and Follow Up

- Putting the Plan into action

Plan Monitoring and Review

- What progress are you making?
- Keeping on track

This Meeting

“No Obligations” Meeting

What are your needs and expectations?

What are you looking for in a financial advisor?

What is your level of commitment to the process?

What is your timeframe for action?

How do you want us to work for you?

Can we deliver what you expect?

Do you need more time before you take the next step?