GETTING A GRIP ON MY FINANCIAL FUTURE?
For that, I have my financial planner.

Estate planning
Retirement planning
Succession planning
Portfolio scan
Financial life coaching
Guidance & monitoring

Protect what matters to you

You, your family, your assets and income are important. A financial plan helps protect them by providing insights for your important financial decisions. And with Financial Life coaching, you constantly have someone to turn to for your financial decisions.

Don't hesitate to get in touch.

You can find more details at:
www.personalfinanceplanners.be

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Insight into the present
Looking into the future
An eye for your risks

A financial plan gives you the big picture

The way a financial plan is developed gives you insights into your situation today, a look at what tomorrow will be your assets and what risks may affect you.

With this methodology, you get an overall picture and can make better decisions for your goals and desires. With financial life coaching, we also put this into practice.

With a recognised and independent financial planner, you have the best guarantees of a good result.

I review options with my financial planner to find the best strategy for:

- **My assets;** how can I ensure that I have more certainty that my assets will remain intact or grow?
- **My pension;** do I have sufficient funds to retire and maintain my standard of living? How do I convert my capital into income?
- At **my succession**, do my assets go to whom I wish them to go? And how do I do that on my terms? How do I protect my partner?
- How do I transfer (to successors) or liquidate **my company**?

Everyone, regardless of their assets, benefits from a financial plan.

What does the plan give me?

That can consist of:

- **financial benefits** (e.g., lower registration fees, better portfolio yield, higher liquidation balance, lower inheritance taxes, etc.)

- **legal benefits** (e.g., better structure in a care proxy, better terms in a gift deed, ...)

- **insights into my equity** (e.g., this property I better sell to reduce inheritance taxes, I better donate this with these conditions, ...).

And often it is accompanied by a peace of mind - knowing that things are **taken care of or just unburdened.**

How is this done?

It starts with a free introductory meeting where we look together at your wishes and goals with your assets and income.

I prepare a no-obligation quote and you know what I will do at what cost.
If I find that you cannot benefit from a plan, I limit myself to some advice at no cost.

We then work out your personal financial plan together, during which we have regular meetings so that we can make adjustments where necessary.

After the final advisory meeting, we look at how I can guide you through the action plan and follow you up with Financial life coaching.

Advice, guidance and follow-up for your financial future.

Personal Finance Planners

is an independent financial planner and certified by the FSMA.
It does not sell investment products and receives no commissions.
Personal Finance Planners provides advice for wealth accumulation, pension planning, succession planning and with financial life coaching.
It focuses on individuals and self-employed people with a company where guidance and follow-up are paramount to achieve a positive outcome for their goals and wishes.

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Why should I work with Personal Finance Planners?

Independent advice and guidance
Personal Finance Planners does not sell products and guides me in implementing my plan.

Across all domains
My personal situation is analysed in detail from tax, legal, financial and social angles. My plan is an overall big and detailed picture.

Tailor-made
My plan is made specifically for me, tailored to my personal situation, my needs and goals.
There is room for my specific questions and even 'what-if' simulations are tailor-made.

Experience
My financial planner has extensive experience in the financial world and, where necessary, experts from his network are called upon if I so wish.

Discrete
My financial planner guarantees complete discretion in processing my personal data.

Correct and integrity
My financial planner always puts my interests first and I can always trust him.

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