Our Investment Process & Proposition

Anyone can pick funds and hope for the best. At Crocus Wealth, we have a clearly defined investment research process, which ensures that you understand the risk you are taking in achieving your goals and objectives. It also provides you with peace of mind that we are constantly reviewing your investments. So, what is the process?

Client

- An initial meeting to discuss your needs and objectives. This could be in any of the following areas:
    - Retirement
    - Educational funding
    - Income needs
    - Saving for a rainy day
- Completion of an investment risk questionnaire, which will provide you with a report clearly identifying your attitude to risk.
- This is then discussed in detail and the outcome agreed with you as the basis for our recommendations.
- We will then make specific recommendations based upon the outcomes from the risk profiling.

Investment

- Appropriate investment portfolio implemented.
- Monitoring your Portfolio on a monthly basis.
- Communication with you to advise on any changes made to the portfolio.
- At least an annual review meeting to discuss and agree any changes to your objectives and any alteration to your attitude to risk.

Completion of our financial health assessment.