

Know where you are and know what's next in the process of your finance journey.

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6



Initial **Discovery Call**

Understanding your goals and situation



High-Level **Assessment**

Early review to give an initial idea of what's possible



Full Assessment & Stategy

Ready to commit and move forward



Application to Approval

Submitting your loan and securing lender approval



Approval to Settlement

Managing all steps through to settlement



Ongoing Support & Care

Support, rate reviews, and future planning



