

# The Optimise Service



High impact support to  
maximise the efficiency  
and output of your  
finances



# What are *your* goals?

Buy first home

Grow your  
business

End a debt  
spiral

Reduce tax

Boost your  
income

Start a family

Retire early

Be Mortgage  
free

Reduce  
Inheritance  
Tax

Build savings

Prepare for  
the future

Reduce bills

Navigate a  
crisis

Make money  
work harder

Simplify &  
automate  
finances

Achieve  
financial  
freedom

# Core ways we help



**Lower spending**

**We deliver quantifiable value, saving clients £4,000 on average over 12 months**



**Transform finances**

**Save time by automating and simplifying your finances**



**Forecast the future**

**Visualise your financial future through cashflow forecasting and create a plan**



**Reduce tax**

**Learn how to save money on your tax bill**



**Boost your income**

**Discover new ways of making money, improving profit or enhancing your career**

# Your Journey



# Is this Financial Advice?

**Whilst Optimise is not financial advice, it works in tandem to ensure you make the best financial decisions with your money. Here are the main differences between the two types of services.**

## Optimise

Bespoke guidance and information with a focus on planning and optimising finances

Companies and products may be suggested but you should perform your own research

Any changes suggested by our Money Experts are facilitated by you

Offering universal and tailored support on any matter related to money

## Financial Advice

Regulated advice involving specific regulated areas like pensions

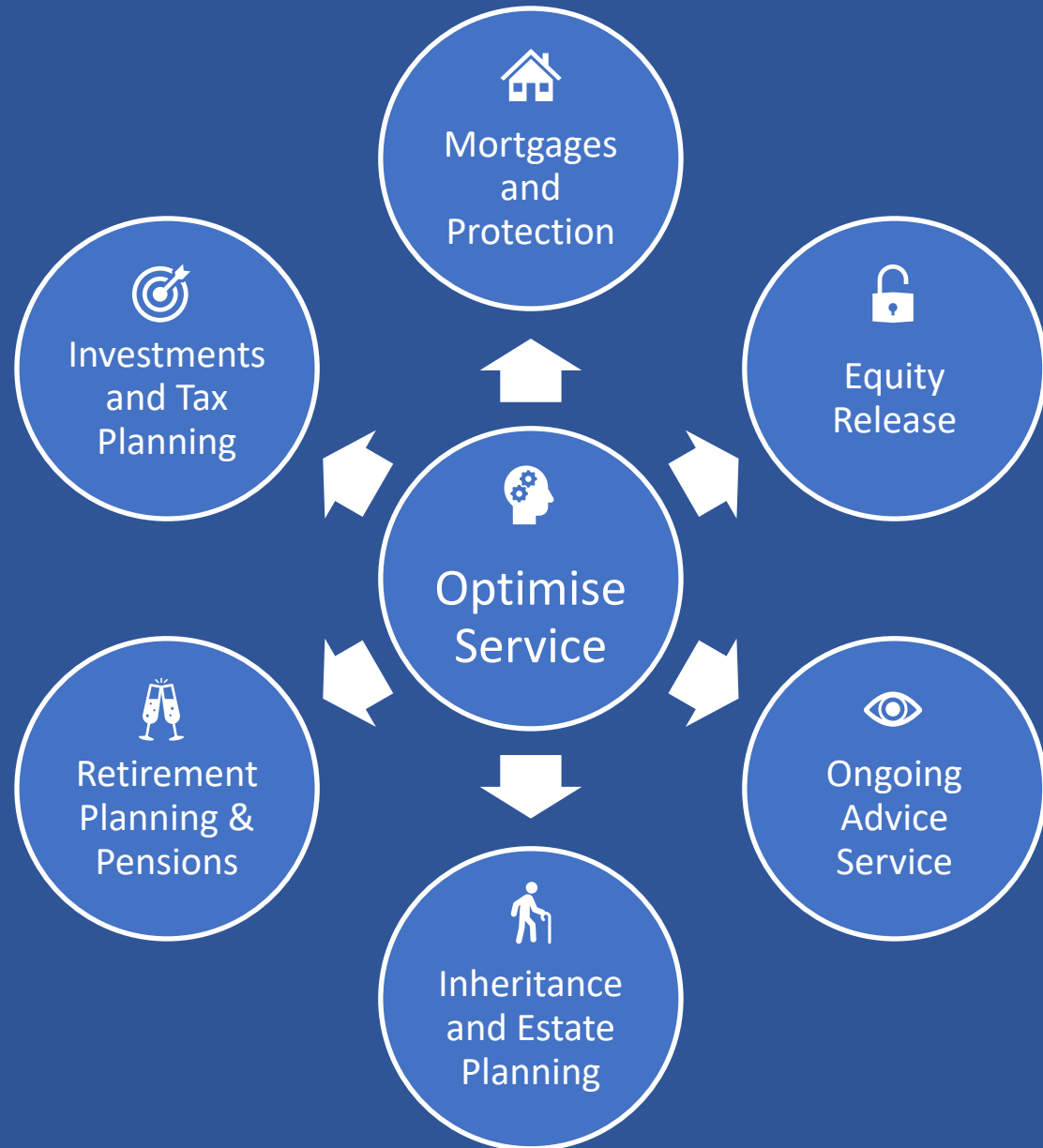
We may recommend and advise a specific financial solution as being the best in the market

Any advice by our Financial Advisers is facilitated by us

Advice will cover specific product types and defined advice areas

# Our other services

After completing an Optimise review, we will identify any Financial Advice that might be required and can arrange a meeting with a Financial Adviser.



# **Subscribe to Optimise for:**

**Meetings and progress reviews  
throughout the year**

**Short notice access to a  
Money Expert**

**Bespoke email notifications on  
changes that can add value**

**Reviewing documents and  
analysis**

**Cashflow forecasting and  
tracking**

**Ongoing assessment of advice  
needs**

**Support during life events**

**Discounted financial advice**

# Read our reviews online

"All Aspects Financial was recommended to me by a family member, and I absolutely recommend them for the OUTSTANDING service provided to me from the outset. Michael is always on hand to assess the matter quickly and advise accordingly, and has professionally guided me and my family through some challenging now and future financial situations leaving me confident that I will be financially well placed going forward."

**Gary W**

"Michael at AAF has been extremely helpful. He's helped us streamline our finances and made budgeting more manageable. He's given us some really sound advice and supported us in all areas. Putting everything into place over the next few months will really make a huge difference to our family life. The continued support with keep us on track and I know if I need any help, guidance or direction, Michael will be there to support."

**Felicity R**

"Michael has provided a great service and support so far in our financial journey and quest to get on the property ladder. I would highly recommend him to anyone looking to be more financially savvy or for a specific financial need."

**Kerri F**


"I can highly recommend All Aspects Financial. They've assisted me with many different areas of my financial life, from planning to insurance and investments making significant improvements. I've really appreciated their personable, professional approach throughout. I look forward to our continued professional relationship. Thanks!"

**Jayson B**

Read more reviews





The background of the entire image is a photograph of a man in a dark suit and tie, smiling and shaking hands with another person whose arm is visible in the foreground. They are sitting at a wooden desk in an office setting with bookshelves in the background.

**[Click here](#) to book a  
meeting**

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