
Empower Your Financial Adviser And Live Better And Longer

Teams generally do better than individuals. The Olympics show us that the best teams have better results than individuals for the same activity – think running and swimming.

So how do you enrol your financial adviser in your team?

Time is the key

The cost of your advice typically time based, so anything you do to save your adviser time can help to keep the cost down. But perhaps even more important, you enable them to spend more quality time in achieving their very best advice for you.

With your own longevity plan in hand – and having harmonised your thoughts with your life partner – you are providing your adviser with a really powerful insight into your attitude, wishes and intended actions.

Why don't advisers take the initiative?

Fully professional financial advisers have a really challenging task and must comply with strict regulations and professional requirements for a strong financial focus.

Until we developed longevity planning, advisers had only simple time information for their financial projections for you, based on the average lifespan at a particular age. With your longevity plan in hand, your adviser can do much better.

Using your longevity information doesn't add to their regulatory requirements.

We all speak time

Time is one of the most common words and concepts we use in our lives. It's much easier for you and your adviser to talk together about your time frame without the complexities of financial talk getting in the way.

Our research suggests another benefit. If your adviser said to you 'well, how long are we planning for?' it's quite likely you would say 'I didn't come here to talk about that'. Without being properly prepared with their longevity plan, people often find talking about end of life and aged care very challenging. With your longevity plan in hand, you are much better prepared to have the discussion. Conversations about the possible remaining stages and how you will address them are much easier and natural for you both.

You and your life partner are a team too

We strongly recommend that both partners have their own longevity plans and identify common ground. It's then much easier to have conversations with your health, financial and estate planning advisers.

Next Steps

We are approaching financial advisers to show them how longevity planning benefits clients like you – and enhances their services too. With your own longevity plan, you can do this yourself. The Introductions menu suggests how to approach others (like family, and health, financial and estate planning advisers) and share your planned actions and outcomes. This can help them understand your longevity and enables them to engage with and support your plan. We'd really appreciate feedback on your experience too.

It's a good idea to update your SHAPE Analyser results regularly - why not do one now?

Try your free upgraded
SHAPE Analyser now