abacus
FINANCIAL CONSULTANTS LLC

Understanding our client proposition and fees.

INVEST IN WHAT COUNTS

The world of financial advice can be confusing, often by design. In creating our award-winning client service proposition, we set out to demystify the delivery of financial advice. We wanted to give clients invaluable context to their most important financial decisions and to do so by positioning ourselves firmly on your side, so you can choose to work with Abacus, confident that you've got the most important decision right.

Our financial planning process.

Before becoming an Abacus client, we have a simple 3-step Financial Planning Process which we will guide you through. This will help to demystify your finances and give you clarity around your ideal financial future:

STEPS	FEATURES	FEES
1 DISCOVERY	An in-depth session to help identify and prioritise your challenges and objectives, while also collating all relevant personal and financial data. This stage also includes an in-depth review of your current financial arrangements.	At our expense
2 PLANNING	Analysis of your current situation and the development and presentation of financial planning advice, covering your current and desired future financial position and the proposed strategy and solutions to help get you there.	Up to 3% of assets considered
3 IMPLEMENTATION	Written recommendations for product solutions, pre-completed applications and a meeting to work through all the detail. Everything is then processed by our administration team, who stay in regular contact while implementation is completed.	

Our ongoing service options.

When you choose to partner with Abacus, we will work with you on an ongoing basis to keep you on track and ensure you achieve your ideal financial future:

1. FOUNDATION	2. BESPOKE	3. HOLISTIC
✓ $250,000 to $500,000	✓ $500,000 to $1,000,000	✓ $1,000,000 +
✓ Online annual review meeting	✓ Online annual review meeting	✓ Online annual review meeting
✓ Digital access to your Advice Team	✓ Digital access to your Advice Team	✓ Digital access to your Advice Team
✓ Quarterly Newsletter	✓ Quarterly Newsletter	✓ Quarterly Newsletter
	✓ **Option of in-person annual review**	✓ Option of in-person annual review
	✓ **Bi-annual online review meeting**	✓ Bi-annual online review meeting
	✓ **Investment rebalancing**	✓ Investment rebalancing
	✓ **Annual forward planning session**	✓ Annual forward planning session
		✓ **Unlimited access to your Adviser**
		✓ **Estate planning**
		✓ **Bespoke investment portfolios**

Invest in what counts.

There are many reasons why people choose to spend a period of time living and working in a different country. Whatever your specific reasons, there will be an underlying financial goal that you are looking to achieve while you are here. Our job is to help you identify that goal, by exploring other aspects of your life and helping you prioritise and order your finances in the process. Then we help you utilise efficient products to invest and ultimately achieve your goal.

INTERNATIONAL INVESTMENT AWARDS 2022 HIGHLY COMMENDED EXCELLENCE IN ADVISORY BEST PRACTICE - GLOBAL

INTERNATIONAL INVESTMENT AWARDS 2022 WINNER EXCELLENCE IN ADVISORY BEST PRACTICE - MIDDLE EAST

INTERNATIONAL INVESTMENT AWARDS 2021 WINNER EXCELLENCE IN ADVISORY BEST PRACTICE

INTERNATIONAL INVESTMENT AWARDS 2021 WINNER EXCELLENCE IN CLIENT SERVICE (MIDDLE EAST) – ADVISERS

INTERNATIONAL ADVISER BEST PRACTICE ADVISER AWARDS '21 WINNER MIDDLE EAST BEST ADVISER FIRM

INTERNATIONAL ADVISER BEST PRACTICE ADVISER AWARDS '21 WINNER MIDDLE EAST EXCELLENCE IN INVESTMENT PLANNING

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