Sound Financial

Always here to **help**

FAQs

Do I have to use the Sound Hub?

We really do recommend it. The Sound Hub is the easiest, most secure and safest way to share your financial information with us — everything you upload is encrypted and kept in one place, rather than travelling over email where sensitive details can more easily go astray. It also means our whole team can see exactly what's been shared and when, so nothing gets lost or missed along the way.

If you're having trouble logging in, please do reach out and we will do everything we can to help.

How are fee's paid?

Fees for your Elevate Programme will be as agreed in your Better proposal document. Our usual approach is 50% upfront, with the remaining balance paid via a six-monthly retainer.

If you'd like the invoice sent to your business rather than to you personally, just let us know.

What does the Elevate Programme journey look like?

Every journey is different, but from start to finish we'd typically expect your Elevate Programme to take around 3–4 months to complete. The exact timing depends on how quickly we're able to gather your information, arrange meetings that work for you, and receive the details back from any relevant providers along the way.

Your meetings along the way are: Passion & Purpose, Clarity, Strategy, and Reflection & Direction.

How do we become an ongoing client?

At the end of your Elevate journey, as part of the Reflection & Direction meeting, you'll have a discussion with your Financial Planner about coming on board for our Ongoing Service. We'll talk through pricing and how we can continue to support you at that stage.

Who will I be working with at Sound Financial Planning?

You're supported by a whole team, not just one person. You'll have a dedicated Financial Planner — either Paul or Andy — who leads your relationship with us.

Dave helps guide you through onboarding, with support from our Client Relationship Coordinators, Edwin and Paige.

Behind the scenes, a great paraplanning team, Liam and Charlie, make sure everything is researched and prepared properly. You may also see Josh, our trainee Financial Planner, join some meetings to lend his expertise. And if you need to book anything in, Katie, our Office Coordinator, is your go-to person.