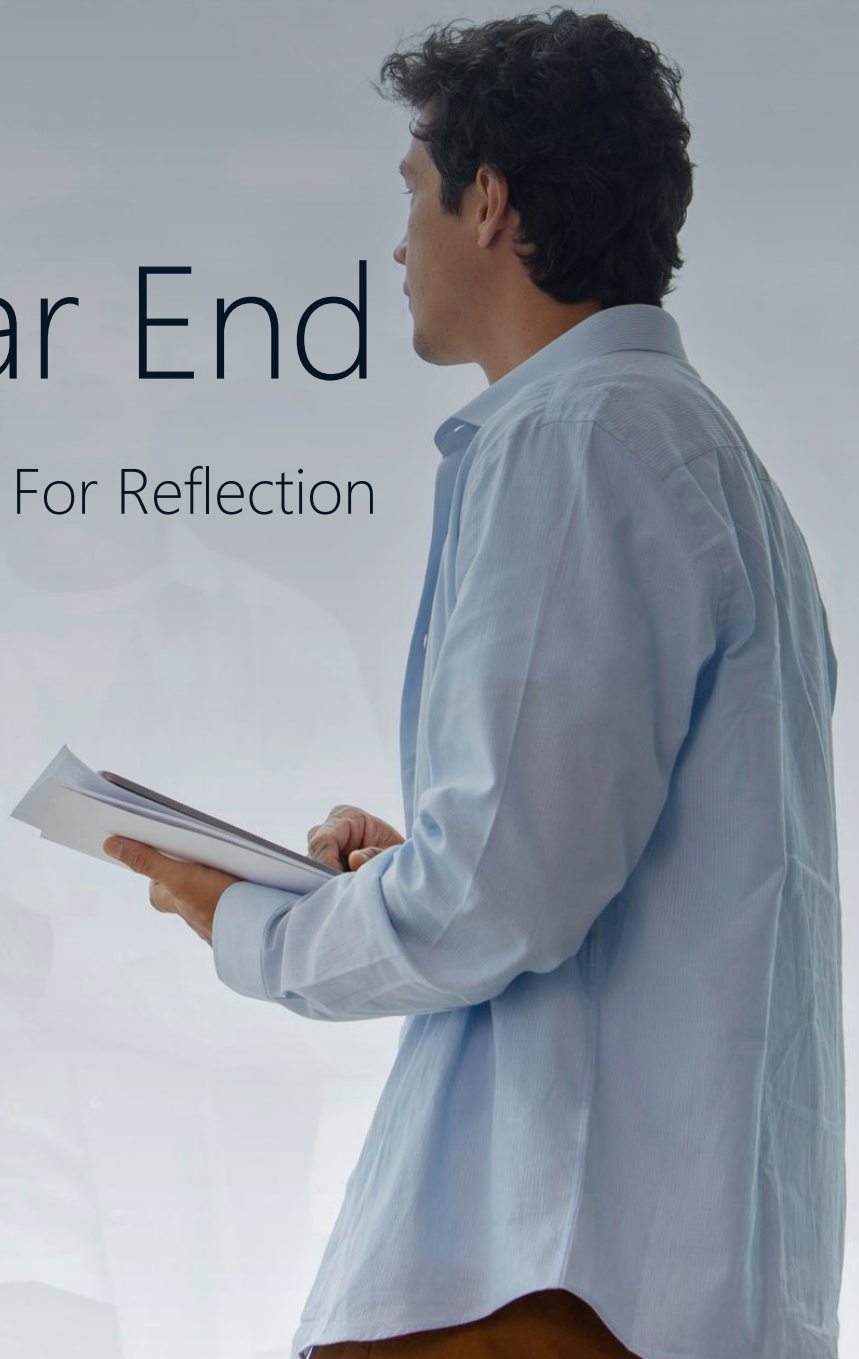




JUPITER WEALTH

Year End

A Time For Reflection



KNOWLEDGE × SECURITY × PROSPERITY

The year end is often associated with budget cycles, last minute rushes to close outstanding projects, conclude transactions, chase outstanding debtors, carry out appraisals and balance the books. What is sometimes overlooked is the opportunity this time gives us to look back at the previous year and to reflect on achievements made, opportunities taken – or missed – and to pause, recharge for the next year and set new personal goals and targets.



Self Reflection

When success is determined by achievement of targets – often set by or with the input of others, including external factors, the ability to inwardly reflect on what you have personally achieved, both in professional and personal life is often overlooked. An important part of self-development, and achieving success, is taking the time to carry out this exercise as it affords the perspective to look at your progress more objectively.



Mapping out a Review

Carrying out reviews would usually entail setting objectives (financial, personal etc) for the year and then reviewing these regularly throughout the year. The year end is a good time to review the objectives and re-assess them against results.

- Review against year's objectives and goals – what was achieved and how
- Identify obstacles and hiccups – what needs to be changed to avoid these recurring
- Look at, and celebrate, achievements – do not forget personal goals e.g. attending school events for children etc.
- Set, or reset objectives and goals



Aim High, and Plan Carefully

Having a purpose, goal or aims helps drive individuals forward, continuing to progress and improve upon themselves. This applies in business as well as life. In business, one of the roles of the leader is to define the strategy, regularly review this and adjust it when necessary. However, more importantly, the role of the leader is to identify how they can successfully execute the strategy – this involves identifying the right people who can make this happen, and the process to achieve it. Teamwork is therefore critical to this.

Whilst having SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals is considered to be key to success, having the right tools (staff, support etc) is also key to achieving this success.



Partners In Your Success

Our success hinges on our clients' success and we consider ourselves to be an important part of the team that supports our clients in achieving their goals. Just like the client has his or her leadership team to support their progress, we consider ourselves to be our clients' support team in their personal and financial affairs.

Our role is continuous – starting with proposing and agreeing a strategy with the client, and then regularly reviewing the progress against that strategy. Periodic reviews are critical to this, as is an annual review. This constitutes our investment and financial lifecycle with our clients.



How can Jupiter help?

Our role is to help our clients achieve their goals – not just their financial goals. In order to do so, we need to be honest with our clients in terms of helping them making their goals realistic and achievable, but also guiding them along the journey and advising them when their goals have been met. Change is inevitable and part of our discussions with clients looks at changes that are happening and how this can alter or affect their goals. At all times, we must be honest with our clients – advising them when an objective is not aligned to their values or not realistic, warning them of any risks and altering course when a strategy is not working.

Year end is therefore an important time of the year for Jupiter Wealth as a pivot point from one perspective (looking back) to another (forward planning), supporting and guiding our clients on their journeys.

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