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## Financial Planning On-board Meeting Sheet

*The meeting sheet enables us to tailor our crew presentation based everyone's specific requirements. We also use it to ensure we have the right number of Seafarer Account Applications with us and to bring additional experts with us should you have specific tax or property queries. A full list of our services is listed below and we are available to answer any questions pre-meetings.*

<u>Name</u>	<u>Position</u>	<u>Email Address</u>	<u>Interested in:</u>

### **United Advisers Marine Services:**

- Standard Bank Seafarer Account openings
- High interest regular savings
- Saving towards a house deposit
- Retirement planning
- Investment reviews
- Tax enquiries and planning
- Buying property abroad
- South African tax services
- Protecting your income
- Lump sum investment management
- Existing account transfers