

# FUTURE MAPPING

## The Pilot Approach



To ensure our advice is appropriate for you, we take the time to understand your interests, goals and life aspirations.

Pilot is a firm that offers specialised and diverse advice. To ensure our advice is appropriate for you, we take the time to understand your interests, goals and life aspirations through our five-step process.

This allows us to provide you with direction and tailored advice to achieve your accounting, finance and business needs, and ensure you achieve your family and lifestyle goals.

### Our approach

Our approach requires planning and goal setting, which we broadly outline on this page.

Depending on your goals, various like-minded professionals may need to be engaged to help achieve the goals upfront or over the years.

### Next steps

If you have any questions or would like to book a meeting, please contact **your Pilot Advisor** on (07) 3023 1300.

### The process



### Pilot Chartered Accountants

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