



Our Financial Planning Process

1. Introduction call/in-person meeting

This is a complimentary meeting to learn more about you and your family, your prioritized objectives & goals, and the desired value of a financial plan. We review tangible examples of the financial planning process and mutually define expectations along with our respective responsibilities and the compensation arrangement. This meeting clarifies whether our service model aligns with your personal needs and make sure we are good fit for you and vice versa.

2. Data Organization

The next step in our process is data gathering. We must understand where we are before determining where to go and how to get there. Your financial information is compiled and organized using a confidential online dashboard. Each planning topic area is summarized to gain an understanding of your current financial landscape. Here is a sample data gathering checklist to provide an example of the financial information that may be requested.

3. Review, Analysis & Plan Development

After all the data is gathered and organized, our team is ready to review and analyze the important information you provided. Using our proven strategies, we start developing a personalized comprehensive financial plan for your family. This plan covers following areas: Risk Management, Estate Planning, Debt Planning, Investment Management & Tax Planning.

4. Plan Presentation & Future Monitoring

The financial review, topic area summaries, planning recommendations, and an action plan are presented during our final meeting. You will gain a full understanding of your current financial situation and learn how to improve your plan in alignment with your personal objectives. If you choose to work with us on an ongoing basis, your financial plan will be updated frequently to match the macro and micro changes in your environment.