

Trying to find your balance with life and finances?



We can turn that stressful chat about money into something easier.

This is how our process works.

Working with us means getting custom-tailored financial planning and investment management services that meet you where you're at.

INITIAL MEETING

Begin to understand what you need to work towards balance in finances and life.

Discuss the values that shape your decisions.

Acknowledge your financial concerns.

Introduce our team, philosophy & process.

Decide if we're a good fit to work together.

1-2 MEETINGS

Clearly define your financial needs and wants.

Discuss the personal and financial circumstances that affect your ability to achieve your goals.

Define your attitude towards investment risk.

Gather detailed financial data.

2-WEEK PROCESS

Perform a detailed analysis of your current course of action.

Assess the value of potential alternative courses of action.

Define the best plan for getting you from where you are now to where you want to be.

Finalize our initial recommendations.

ONE MEETING

Illustrate the probability of reaching your goals based on your current course of action.

Demonstrate the impact of relevant alternative courses of action.

Explain the relationship between your current investments and your attitude towards risk.

Present our initial recommendations.

MEET AS NEEDED ONGOING

Implement the plan.

Align current investments with recommendations.

Begin the agreed upon savings & debt repayment strategies.

Align insurance policies with recommendations.

Coordinate with strategic partners to address tax and estate implications of your financial situation.

Set expectations for communication.

Monitor the progress of your plan.

Proactively update our recommendations as you experience life changes.

Adjust your plan as you reach your goals and develop new ones.

Complete an Annual Review.

Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/ SIPC.



Oh, hey! Let's get the ball rolling.

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