Business Planning Process

Step-by-Step Guide: New Client Onboarding

MFG
SINCE 1963

Step 1	Step 2	Step 3	Step 4	Step 5
Discovery / FIT Analysis	Engagement of Services	Financial Strategies Presentation	Plan Implementation & Next Steps	Ongoing Oversight & Reviews

OWNER FOCUSED RETIREMENT PLANNING

We design customized retirement income plans, built specifically for you, your family, and the future of your business.

EMPLOYEE BENEFITS

Our team helps ensure that the benefits package you offer provides value for both the firm owners and their employees.

INVESTMENT PLANNING

Our team will help design an investment allocation plan based on your goals, your timeline, and your tolerance for risk.

OPERATIONS & BUSINESS ANALYSIS

We help entrepreneurs and their employees address the goals and challenges that small businesses face.

TAX MANAGEMENT

We work with your tax professionals to provide planning built around potential business and personal tax strategies.

FINANCIAL ESTATE & SUCCESSION PLANNING

We work with estate planning and business valuation professionals to assist you in designing a financial estate and business succession plan built around your goals.