Our Planning Process

Planning is about outcomes. To achieve your desired outcomes in the most efficient manner, we look across the many aspects of your financial life and help them work in harmony.

Introduction

STEP 01

Since everyone's needs are different, the first conversation is an informal one to determine if we are good fit for one another. We like to ensure that our knowledge, capabilities and business structure can meet each client's needs and that we share a similar philosophy about planning and investing.

Discovery

STEP 02

This is when we begin to take a deeper dive into goals and priorities. We use a process called Discovery to gain a better understanding of the people, places, and pursuits that bring meaning to your life and build your plan around these important themes. Once these things are known, we begin to examine the many pieces already in place. To gather the necessary data in a secure way, we leverage a variety of tools that enable us to share information electronically. We will establish a secure portal and send a personal invitation to access a variety of data gathering tools. Once complete we will move to Step 3.

Review, Analyze, & Model

STEP 03

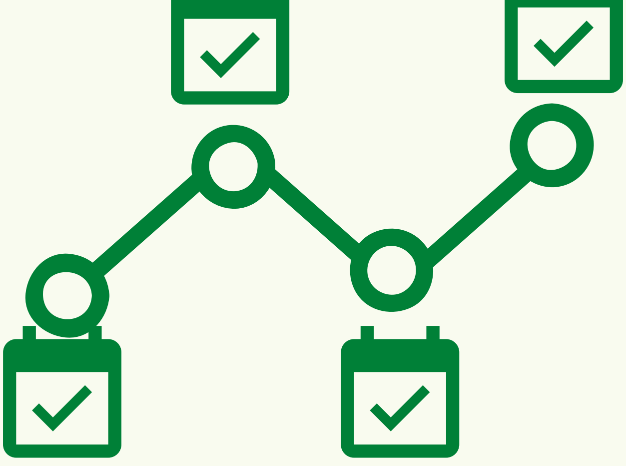
This is where we refine and organize data and begin to review, analyze and model what is already in place.

Recommend & Discuss

STEP 04

This is where we discuss possibilities, reaffirm goals and priorities, and make any necessary changes so we can make strategic recommendations and finalize the written plan.

Implement & Monitor



STEP 05

And finally we move to implementation. Identifying the appropriate who, what, when, where, and how to put the plan in action with the appropriate checkpoints to make sure everything gets completed. More importantly, as life, laws, rules, and strategies continue to change a foundation is in place for responding to change when necessary.

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