

Financial Planning Process

Birch Street Financial Advisors



Mutual Fit Meeting

Build trust, understand your needs, and decide if we're a good fit to work together.



Get Acquainted Meeting

Review your current financial picture and walk through our planning process to see how we can best support your goals.



Get Organized Meeting

Gather key financial details, get your accounts connected, and start identifying what matters most to you as we begin building your plan.



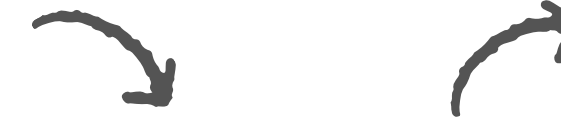
Explore Possibilities Meeting

Refine your plan by reviewing how you spend your time and money, confirming key assumptions, and testing how your strategy holds up in different scenarios.



Investment Policy Review

Align your investments with your goals and risk preferences, assess how your portfolio aligns with your goals, and make any needed updates to your investment strategy.



Plan Delivery Meeting

Present your financial plan, review key recommendations, and confirm everything aligns with your goals and values.



Ongoing Financial Planning

Review your progress, discuss any changes, and make updates to keep your financial plan on track.