

Our Financial Planning Process

1

Information Gathering

Understanding your personal and financial circumstances, including your income needs and vision for the future

2

Discovery

Identifying and selecting your goals, both short- and long-term

3

Analysis

Analyzing your current course of action and potential alternative courses of action

4

Design

Developing our financial planning recommendations

5

Presentation

Presenting recommendations including tax and retirement planning, insurance needs, education funding strategies, and estate planning

6

Implementation

Implementing our planning recommendations, which involve executing agreed upon strategies and referrals to other professionals, as necessary

7

Monitoring

Monitoring progress and updating or modifying strategies, as necessary