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The Planning Process

✕ **The Introductory Meeting**

I will introduce our wealth management process by first discussing your goals and needs. I will review your current assets, liabilities and time horizon. At this time, we will assess together if we can help you and whether you are comfortable working with me.

✕ **The Analysis**

I will focus on your individual needs and provide you with a detailed evaluation of all aspects of your wealth, including your asset allocation, retirement cash flow, lending, liability, education funding and estate planning needs.

✕ **The Presentation of an Investment Plan**

I will present to you my recommendations and be prepared to implement them at this time.

✕ **Ongoing Monitoring**

To keep you informed of your performance, I will conduct annual, semiannual or quarterly reviews depending on your needs. I will also provide the resources to help continually monitor your assets so I can make appropriate changes, if necessary.

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