



Eight Steps to Financial Success

Step Eight

Follow Up

Financial checkups are recommended at least annually. More frequent meetings may be needed if your financial picture changes or for complex financial situations.

Step Seven

Plan Implementation.

The plan (from step 6) will have recommended implementation steps. We can assist you with implementation if requested.

Step Six

Financial Plan Presentation

We will review the plan and implementation instructions with you and discuss any questions you may have about them.

Step Five

Analysis and Plan Formation

This is where we go to work analyzing your data, do any necessary research, and develop a customized plan for you.

Step Four

Interactive Session (if needed)

For more complex situations, an interactive planning session (or sessions) may be necessary to further iron out issues. Sometimes these issues can be handled by phone.

Step Three

Data Gathering and Initial Preparation

When we receive your information, we begin to review and develop your financial plan. We prepare initial reports and identify additional information needed. In Step 3, you gather the data requested (including possibly, a cash flow worksheet and risk tolerance questionnaire). You may fax or mail this information to us.

Step Two

Get Acquainted Meeting

This initial meeting is an opportunity for us to exchange information about your needs and objectives and further discuss which of our services are right for you. We will also provide an estimated fee quote. When you decide to engage our services, we will give you a list of additional information needed to begin formulating your financial plan. One-half of the estimated total fee is due at the time of this engagement.

Step One

Visit our Web site or call for an Introductory Package.

After your initial contact with us, we will send you a Confidential Questionnaire. We request that you fill it out and return it to us at least two business days before the initial meeting..