Planning Process

Investments are just one part of your financial strategy. Our comprehensive planning process analyzes all other aspects to ensure your finances work efficiently, effectively, and most importantly: **for you.**

Planning Phases

Fact Gathering: 1-2 Meetings

We will work together to collect information on income, expenses, insurance, properties, businesses and other pieces of your financial picture.

We will then help you identify your goals and top priorities

Deep Dives: 3-4 Meetings

Once we have all of the details, we will work through each topic, beginning with your priorities. Together, we will identify gaps, efficiencies, strategies and plans.

- Financial Organization
- Retirement Planning
- Tax Efficiency & Distribution Planning
- Risk Analysis
- Investment Planning
- Insurance Gaps
- Social Security Timing
- Estate & Legacy Planning
- Charitable Giving Strategies
- Business Succession Planning

Plan Delivery & Lifetime Adjustments

After working through each area thoroughly, you will receive your documented plan. As life changes, we'll be right beside you to update and evaluate as you need.

Financial Planning Investment Level Guide

The first meeting is always free, and provides a quote for your process.

	Foundation Complimentary	Silver $2,500	Gold $3,500	Platinum $5,000+
Existing Investment Clients	◆			
Retirement Assets		◆		
Home Property		◆		
Investment Accounts		◆		
Mortgage, Car Payment, Debts		◆		
Small Business Owner			◆	
1-2 Investment Properties			◆	
Properties in Multiple States			◆	
Legacy Planning for Blended Families			◆	
Business Partnerships				◆
Medium to Large Business Ownership				◆
3+ Investment Properties				◆
Complex Estate Planning Analysis				◆