# OUR SIGNATURE PROCESS

**DISCUSSION**

- Your objectives and concerns
- The process
- Expectations and fees

**Client completes financial profile.**

**DISCUSSION**

- Develop specific, measurable goals
- Uncover "why" behind the numbers
- Begin prioritizing

**Financial Planner begins analysis.**


**DISCUSSION**

- Verify plan data
- Highlight areas of concern or opportunity
- Share initial findings
- Collaborate to develop "what if" scenarios

**Financial Planner develops custom recommendations and action plan.**

**DISCUSSION**

- Review custom recommendations and strategies
- Answer questions
- Review action plan
- Chart specific, time sensitive path designed to help you pursue your financial goals

- Act on recommendations according to timeline established in action plan. Together, we agree on a future monitoring strategy.

## FINANCIAL PLAN MONITORING PROGRAMS

A financial plan provides a comprehensive roadmap to help you meet your goals after a thorough evaluation of your current financial position. Many personal factors (i.e., birth of a child, new job, inheritance, new home purchase, retirement, marriage/divorce); or economic factors (i.e., stock market volatility, tax law changes, political/economic environment changes) could cause your current financial position to change.

If any of these changes occur or you would benefit from a regular review to confirm you're on the right track, consider one of the following programs:

**ANNUAL PLANNING**
Ensure you're on track and making the most of your financial resources by reevaluating your financial goals and circumstances every year.

**ON DEMAND REVIEW**
Whenever necessary, we are always available to update your financial plan according to your current financial situation.