YOUR FINANCIAL JOURNEY: A 10-STEP ROADMAP FOR YOUR FIRST YEAR WITH US

To help you understand what to expect as a client of Vaillancourt & Lefebvre Wealth Management, we've outlined a 10-step roadmap highlighting key milestones throughout your first year.

Exploration Call

Discussion about your goals, concerns or issues and help you make an educated and informed decision about our firm.

Onboarding & Welcome

Review your Client Welcome Packet, access your portals, and start uploading documents to begin your financial journey.

SWOT Assessment Process

Built upon our multi-decade experience we assess your current plan strengths, weaknesses & evaluate opportunities & threats.

Strategy Meeting

We will present our initial findings based on the documents you provided and discuss your financial goals. This meeting helps us refine our recommendations and align them with your needs.

Plan Design

Here, we use the data gather from our meetings, analysis, expertise & experience to begin crafting your personal wealth plan.

Implementation Process

Once your plan is finalized, we proceed with signing necessary paperwork, rolling over or opening new accounts, and implementing the agreed-upon strategies to set your financial plan in motion.

Investment & Planning Process

Once your overall plan is developed, we schedule a quick check-in with you to address any immediate questions, make necessary adjustments, and outline the next steps in your ongoing financial journey.

Plan & Investment Monitoring

On-going monitoring and reporting of and on your financial plan & investments is a cornerstone of our process. We will meet at least annually to report on your plan & review your accounts.

Education & Communication

- Monthly Newsletters
- Market Commentary Videos
- On-going tax planning & consulting.
- Always on-call access.
- Electronic document storage.

Ongoing Client Review

We establish a customized service model to include the frequency of reviews, content we will cover during reviews and personalized meeting agenda to address your ongoing financial needs and concerns.