Paxton Financial Services Wealth Management Consultative Process

We aim to customize each plan based on your financial goals. Using our holistic approach, we evaluate your needs, assess the options, devise a targeted strategy and manage all of the investment elements to achieve your dreams. Our clients choose us for our experience with wealth management, advanced planning and our high-touch relationship management with you and our professional network.

Here's a roadmap of our process, taking you closer to your financial destination:

DISCOVERY MEETING

We establish your short, medium and long range goals, plus:

- Do a risk evaluation.
- Review financial history.
- Discuss strategies.

INVESTMENT PLAN MEETING

After reviewing your assets and goals, we present you with an investment plan that is tailored for your needs and is designed to meet your objectives.

FOLLOW-UP MEETING

Organization of account paperwork and check in.

REGULAR PROGRESS MEETINGS

Every 90 days, we'll evaluate your portfolio. This includes:

- Comprehensive evaluation of your situation to see if anything has changed.
- If necessary, recommending changes and adjusting the plan.
- Review/implement advance planning for wealth enhancement, wealth transfer, wealth protection or charitable giving.

THE PROFESSIONAL NETWORK

Paxton works with a team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas. We'll connect you with the appropriate experts based on your needs.

PROFESSIONAL NETWORK MANAGEMENT

We'll manage your relationship with this network, as they evaluate all aspects of your financial situation and create appropriate solutions.

Paxton Financial Services

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