The Wealth Journey Process

No matter where you are in your wealth or life, both are a journey worth planning.

Our six step process is one we've developed and implemented for each of our dedicated clients. Our process sets the standard for how we work and who we work with; only those committed to the journey.

01 Visualize It.

What do you really want? How do you see your future unfolding? What's your purpose?
One of our unique abilities is helping our clients get to their truths; what they really want, why and how.

02 Plan It.

Where are you at? Where are you headed? How will you get there?
We work to create plans that are aligned with what you want and help you make the necessary decisions likely to lead to a successful journey.

03 Manage It.

How can you simplify and organize your financial world? What investments are you comfortable with? Is your estate optimized? Are your income and assets protected?
We dive deep into the details of your plan. We consider appropriateness, accuracy, effectiveness, and efficiency.

04 Track It.

Are you on the right track? How will you know? Has anything changed in your world? Has anything changed in the world of finance, economics or tax law?
We monitor progress and account for changes every year from here on. We recalibrate when needed.

05 Live It.

Are you carrying through with your dreams? Are you living your life?
We're here to support you living the life you want, both financially and personally.

06 Pass It.

Are you passing on your values and wealth to the people and community most important to you?
We work with clients to ensure they are effectively and thoughtfully communicating and transferring their wealth and values.

RASKIN PLANNING GROUP
WEALTH IS A JOURNEY

RaskinPlanning.com 175 Federal Street, Suite 1050 Boston, MA 02110 617.728.7433

Peter Raskin is a registered representative of Osaic FA, Inc. Securities and investment advisory services offered through Sagemark Consulting, a marketing name for Osaic FA, Inc. Osaic FA is seperately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic FA. CRN-5883223-081523