



Wealth Management Process

Embrace life's transitions. **Liv** for Tomorrow.

Two Weeks

One week

45 Days

90 Days

DISCOVERY MEETING

Complete discovery process

INVESTMENT PLAN MEETING

Presentation of investment plan

MUTUAL COMMITMENT MEETING

Confirmation of commitment

45-DAY FOLLOW-UP MEETING

Organization of account paperwork

REGULAR PROGRESS MEETING

Review of progress and implementation of advanced plan

INVESTMENT PLAN AND IPS

Diagnostic of current situation, our recommendations for moving forward and details on our investing approach

THE ADVANCED PLAN

Comprehensive evaluation of the entire range of financial needs with our recommendations for moving forward

THE PROFESSIONAL NETWORK

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas

PROFESSIONAL NETWORK MEETING

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devise appropriate solutions