01 INITIAL MEETING

The Initial Meeting provides an opportunity for us to get to know you and assess your needs and determine what you want to achieve.

We will discuss your current financial situation and how you plan to reach your goals.

We will also provide you with an overview of our financial planning process, including the services we offer.

02 DATA GATHERING

This is a crucial step in our process. We will gather comprehensive information about your financial situation to develop a comprehensive plan.

We will collect and analyze your financial data, including your income, expenses, assets, and liabilities.

03 INTAKE MEETING

At your Intake Meeting, we will verify the data that we have gathered and confirm your understanding of your financial goals.

We will review your financial data and validate your understanding of your financial goals and objectives.

04 ANALYSIS

Once we have a detailed understanding of your financial situation, we will perform a comprehensive financial analysis to assess your current financial position and identify opportunities for improvement.

We will analyze your financial data and provide you with a detailed report outlining your current financial situation and potential strategies for improvement.

05 DELIVERY MEETING

At the Delivery Meeting, we will present you with our findings and recommendations.

We will discuss the implications of our analysis and provide you with a detailed plan for achieving your financial goals.

06 REVIEW GROUP MEETING

Your Review Group Meeting will be scheduled at your convenience to review your financial plan and assess your progress.

We will provide you with a detailed review of your financial plan and assess your progress towards your financial goals.

07 FOLLOW UP MEETING

We will schedule Follow Up Meetings to ensure that you are making progress and that you feel confident in your financial plan.

We will also provide you with a comprehensive review of your financial plan and assess your progress towards your financial goals.

Our Process