Our Process

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We want to be your total wealth management solution. Through a proven process, our team of experts will discover and recommend the best investment, tax, estate, risk, legal and wealth strategies. Our comprehensive approach ensures peace of mind through your transition into retirement and beyond.

first step

Discovery Meeting
The Discovery meeting is designed to understand your goals, family needs and the current financial situation. Each person and couple bring a unique set of challenges and opportunities, but share a singular goal to have financial peace of mind in retirement.

second step

Presentation Meeting
After your goals are analyzed, we present you with Observations & Recommendations and Investment proposal customized for you and your family. This both defines your planning strategies and how investments will be managed. Both are focused on creating a plan to meet your goals.

next steps

Mutual Commitment Meeting
Review and sign agreement to hire and then prioritize a list of actions to organize your accounts.

Follow-Up Meeting 45-day
Review Observations & Recommendations, check progress of investment accounts, update legal documents, and assess risk and tax strategy.

moving forward

Quarterly Process Meeting
Our commitment to achieving your retirement goals is constant. We provide quarterly updates to track performance against your goals. But we are always at your disposal to meet, to answer questions, and to listen as things change.

our fee

Our fees are based on assets under management. There are no investment commissions. That ensures your interests are our only concern. Fees are billed at end of each quarter and may be automatically deducted. So, there are no bills to pay or checks to write, and advisory fees may be tax deductible.