JAX WEALTH ADVISORS

OUR DISCIPLINED PROCESS

We have a clear process to understand your goals and develop appropriate recommendations.

Initial | 1 Day → Ongoing | 90 Days+

1 Discovery Process

- Identify your goals, values, dreams, concerns /challenges.

2 Develop Investment Strategy

- Determine risk tolerance
- Analyze current investment portfolio
- Develop asset allocation strategy
- Portfolio construction

3 Investment Strategy Meeting

- In-person meeting to present recommended investment strategy.

4 Execute Investment Strategy

- Open new accounts
- Transfer existing assets
- Conduct trades to execute agreed-upon Investment Strategies

5 Follow-Up Meeting

- First statements
- Organization of paperwork
- Set-up online account access and review online resources.

6 Develop Wealth Management Plan

- Comprehensive Financial Planning
- Retirement Planning
- Education Planning
- Charitable Giving
- Succession Planning

7 Ongoing Management & Monitoring

- Develop schedule for review meetings
- Monitoring of asset management
- Changes as needed

Note: Each clients situation is unique. At times, this process may be modified to better suit the needs of an individual or household.