

Financial Planning Process



Set Up Your Wealth Website



Organize Your Financials



Present Your Plan



Prepare Your Plan



Identify Your Goals & Vision



Implement Your Plan



Periodically Review & Revise

The Wealth Consulting Group 

 **ANCHOR**
WEALTH MANAGEMENT GROUP, LLC

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through WCG Wealth Advisors, LLC, a Registered Investment Advisor. WCG Wealth Advisors, LLC and Anchor Wealth Management Group, LLC are separate entities from LPL Financial.