



FIND BALANCE IN YOUR FINANCIAL LIFE

COMPREHENSIVE FINANCIAL PLANNING & INVESTMENT MANAGEMENT



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Our Planning Process

STEP 1: DISCOVER

We focus on you—discovering and identifying your financial concerns, goals, and dreams. We spend time learning how you make financial decisions, how you function, and what your values are. We explore where you are now and where you are trying to go.

STEP 2: DEVELOP

We will work with you one-on-one to develop a comprehensive game plan with written, objective, and specific recommendations tailored to you. Our strategies will focus on building balance in your financial life, helping you achieve your goals efficiently and effectively.



STEP 4: TRACK

We meet regularly to track changes in your life as well as the larger world, while also tracking your progress towards your goals. From there, we will determine what adjustments are needed to move you forward.

STEP 3: IMPLEMENT

One of the keys to financial success is taking action. After we agree on our course of action, we will provide an outline of specific steps to implement our strategy, helping you each step of the way.

Our Core Values

Relationships & Teamwork

Geeta Brana Wealth exists for one reason: to help women.

Helping you retire comfortably, put your kids through college, buy a home, optimize your company stock, align your investments with your goals and values, or leave money to future generations or charities are just a few of the objectives on which we can guide you.

We will be there every step of the way to make sure you are taking the right actions to move you forward financially and reach your goals. Your money is your money. Our goal is to educate you about all of your options, including the pros and cons of each, providing you with the knowledge to make informed financial decisions.

Our underlying focus is to help our clients find balance in their financial lives. Money and finances can be stressful — we want to create a system for you to help reduce that stress and prioritize your goals. Together, we'll balance your long-term and short-term goals, empowering you to enjoy life today.

Our Qualifications

Geeta Brana has been providing financial planning services for over 20 years. We provide comprehensive financial guidance for those going through major life transitions and those looking to balance different life goals. Whether through financial planning or investment management, we follow a disciplined approach to balance risk and return and believe that educating our clients allows them to make informed decisions with confidence.



What We Offer

We realize that everybody's situation is unique and meet each client where they are at financially. Our job is to figure out how to get you from where you are today to where you want to be financially as efficiently as possible.

We work collaboratively with you to create a plan to reach your goals. The relationships we have with each of our clients is at the core of everything we do.

OUR SERVICES:

- Investment and Wealth Management
- Retirement Planning and Strategies
- Income Distribution Strategies
- Estate Planning Strategies
- Life, Long-Term Care & Disability Insurance
- Annuities Strategies
- Life Transition Support & Planning
- Legacy Planning
- Divorce Consulting



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