# 5 STEP CONSULTING PROCESS

Our disciplined process is designed to provide solutions that are tailored to your individual planning needs. This means it can be used with a single strategy, such as retirement planning or as the basis for a comprehensive plan. This ongoing process grows and changes with your planning needs.


STEP 1 - WHERE AM I TODAY?
- Gather Important Information
- Complete client questionnaire
- Ask additional questions

STEP 2 - WHERE WOULD I LIKE TO BE?
- Establish Goals and Objectives
- Understand what is important to you
- What you want to accomplish

STEP 3 - CAN I GET THERE?
- Analyze Data
- Determine if goals can be achieved
- Develop a plan

STEP 4 - HOW DO I GET THERE?
- Discuss plan and how to implement it
- Educate client about strategy and recommended investments
- Secure the commitment

STEP 5 - HOW DO I STAY ON TRACK?
- Ongoing consultation, education and evaluation
- Follow-up meetings
- Monthly/Quarterly statements
- Ongoing customized portfolio reviews

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