



FINANCIAL PLANNING PROCESS

We are passionate about empowering clients to make informed financial decisions that fit their unique life goals, educating them about the strengths and potential challenges of their financial plans using a collaborative six-step process:



ENGAGE



LISTEN to You

Our first step is to learn about you--your goals, values, and unique life situation. We strive to listen carefully in order to discover what it means for you to live a fulfilling life.



CLARIFY your Data

Once we understand your unique life goals, we will work together to gain a complete picture of your financial life, making sure that we are on the same page and ready to move forward.

ENLIGHTEN



DEVELOP Your Plan

With your goals and data in mind, we can now develop a personalized financial plan that will help you pursue your goals and overcome your financial challenges.



EDUCATE You About Your Plan

Once we have developed your plan, we help you understand our recommendations and make you aware of any strengths or weaknesses of your financial situation.

EMPOWER



IMPLEMENT Your Plan

After being educated about your plan, you are now ready to implement its recommendations. Together, we will overcome any challenges you face while putting your plan into practice.



MONITOR and Adapt Your Plan

Because your life is dynamic and always changing, your financial plan will need to change too. We will use your wealth management portal to monitor your progress and we strongly encourage you to meet with us regularly to help you remain on track and adapt your plan to overcome new challenges as they arise so you can confidently pursue your goals and live a fulfilling life.