

STRATEGIC FINANCIAL PLANNING PROCESS

1. DISCOVERY INTERVIEW

- Get a basic understanding of your needs and goals
- Explain our capabilities and process
- Answer questions
- Agree to work together

2. GATHER DATA

- Discuss your unique circumstances and goals
- Review relevant financial and legal documents
- Identify issues or areas of concern

3. ANALYSIS AND STRATEGY DEVELOPMENT

- Validation of your needs and goals
- Comprehensive analysis of financial position
- Collaborate with your other key advisors as necessary
- Development of specific recommendations

4. PLAN PRESENTATION AND DELIVERY

- Deliver analysis of current situation
- Identify gaps and opportunities
- Detail specific recommendations
- Obtain consensus on overall strategy and recommendations
- Execute required documents

5. PLAN IMPLEMENTATION*

- Complete transition of identified assets
- Execute each component of plan
- Confirm implementation with client

6. MONITOR AND UPDATE

- Monitor performance of plan components
- Revisit plan when a major change to your circumstances occurs
- Recommend adjustments to capitalize on new opportunities



*Plan implementation can be done through a firm of your choice

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