

Our Process: Finding Financial Confidence

Accumulating wealth brings opportunities, but it also brings complexity. We work hard to build our wealth, only to realize it tends to come with as many questions as answers. You've earned your wealth, let us help you simply, organize and plan your wealth to enjoy a new level of Financial Confidence. Our "Financial Confidence" process is designed to answer your questions, maximize your planning and help you turn your success into the confidence you deserve.



Learn More Call

We start by listening so we can understand your needs and if we can help.



Discovery Meeting

We dive deeper into your goals, needs and priorities so we can design a plan that maximizes your wealth in all the ways that matter.



Information Gathering

We'll provide you a personalized list of documents and information we need to build your personalized financial plan.



Plan Presentation

We'll review your personalized financial plan and strategies we've chosen to help maximize your financial life.



Plan Implementation

Once we have a final plan you feel good about, we'll discuss an ongoing relationship to be your trusted advisor for implementation

30 DAY CHECK-IN

We will discuss and outstanding items and answer any of your questions.

90 DAY CHECK-IN

Now that the game plan is in place, we review what's next and address questions.

ON GOING REVIEW (YEARLY)

We will meet annually — or sooner if you'd like — to review any life changes and make adjustments to your game plan.

