It All Starts with a Plan

1 Discover

The first and most important step in the process is to understand the clients' short- and long-term life goals. The discovery phase is intended to reveal how specific goals fit into the greater picture of their lives by organizing them by time-frame and priority.

2 Assess

Based on the information presented during the discovery phase, advisors can understand what needs to be done to achieve each goal. This phase is intended to provide context around the client's time horizon and risk tolerance.

3 Evaluate

Clients are presented with various scenarios to show how they can achieve their current and future goals. With the help of the advisor, clients can then determine which option best suits their needs.

5 Monitor

The final step: Continuously track progress toward goals and adjust the plan, as needed, based on life changes.

4 Implement

Once the financial plan has been established, the implementation phase turns that plan into reality. The components of the plan are created to ensure that it aligns with the clients' goals.