



The Wealth Management Process



1

The Vision Workshop

Evaluate your current situation and develop a clear vision for your future.



2

The Life Strategies Session

Helps you develop a step-by-step life plan to achieve your vision.



3

Design Development Discussion

The goal is data verification and review of initial modeling.



4

The Financial Blueprint

A detailed written financial strategy to help you achieve your personal and financial vision.



5

The Implementation of The Financial Blueprint

Assistance to help you implement the actions necessary to achieve your goals.



6

The Progress Sessions

Regular updates of your progress to help you stay on track towards your vision.