OUR PROCESS

CUSTER PLUMB FINANCIAL SERVICES

WE WANT TO LEARN MORE ABOUT YOUR PERSONAL SITUATION, IDENTIFY YOUR DREAMS AND GOALS, AND UNDERSTAND YOUR TOLERANCE FOR RISK TO DESIGN THE BEST SUITED FINANCIAL PLAN TO MEET YOUR PERSONAL INVESTMENT, RETIREMENT & BUSINESS GOALS

STEP

1 GETTING STARTED

learn more about your personal situation (dreams, goals, tolerance for risk)
gather financial data
enter into formal working agreement with CPFS

Your Time: 1-2 hours

2 PROCESS YOUR DATA

- input your data into e-money system
- introduction tutorial on e-money system
- begin financial analysis

Your Time: 1.5 hours

3 PLAN PREPARATION

- conference call to verify data & finalize financial plan
- overview of financial products best suited to obtain your goals
- input additional documents/data to e-money

Your Time: 1.5-2 hours

4 PLAN FINALIZATION

- determine additional action items
- delivery of your personal financial plan
- investment policy statement
- discuss plan implementation
- start charting the road map to your financial peace!

Your Time: 1.5-2 hours

5 FULL ADVISORY ACCESS& ANNUAL REVIEW

- constant analysis & monitoring of your plan by our team of financial experts
- schedule annual (at minimum)l review with CPFS advisor
- make best suited updates or changes to your financial plan

Your Time: 1.0 hours

Contact Us: 608.238.8388
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