



**DAVIES**  
**WEALTH MANAGEMENT**  
PROVIDING THE HIGHEST OF QUALITY SERVICE.

## OUR DISCIPLINED PROCESS

We have a clear process to understand your goals and develop appropriate recommendations.

Initial | 1 Day → Ongoing | 90 Days+



- Identify your goals, values, dreams, concerns /challenges

- Determine risk tolerance
- Analyze current investment portfolio
- Develop asset allocation strategy
- Portfolio construction

- In-person meeting to present recommended investment strategy

- Open new accounts
- Transfer existing assets
- Conduct trades to execute agreed-upon Investment Strategies

- First statements
- Organization of paperwork
- Set-up online account access and review online resources.

- Comprehensive Financial Planning
- Retirement Planning
- Credit and Lending
- Education Planning
- Charitable Giving
- Succession Planning

- Develop schedule for review meetings
- Monitoring of asset management
- Changes as needed

**Note:** Each client's situation is unique. At times, this process may be modified to better suit the needs of an individual or household.