Ryan Hobbs Investment Services, Inc.

Wealth Management Formula

WM = IC + AP + RM

WM (Wealth Management) =

IC
(Investment Consulting)
+
AP
(Advanced Planning)
+
RM
(Relationship Management)

IC = INVESTMENT CONSULTING

Historical Portfolio Performance Analysis

Risk Evaluation

Asset Allocation

Investment Policy Statement Building and Review

Portfolio Protection

AP = WE + WT +WP + CG

AP (Advanced Planning) =

WE: Wealth Enhancement (tax and cash-flow planning)
+
WT: Wealth Transfer (transferring wealth effectively; may not be within a family)
+
WP: Wealth Protection (risk mitigation, legal structures and transferring risk to insurance companies)
+
CG: Charitable Giving

RM = CRM + ENRM

RM (Relationship Management) =

CRM
(Client Relationship Management)
+
ENRM
(Expert Network Relationship Management)

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