Quintus Wealth Management Process

1 Discover

We take the time to get to know you:

- identify and prioritize your goals
- quantify and benchmark goals
- look at your current financial and personal picture

2 Develop

We will develop a plan that will include:

- steps to optimize cash flow
- reduce debt and other liabilities
- portfolio allocation recommendations
- provide retirement, education savings and asset protection solutions
- ensure conformity with your estate plan

3 Deploy

We work with you to transition to the new plan. As you implement the recommendations from the Develop phase, we will administer and manage the assets to help you move toward your goals

4 Debrief

We will monitor allocations and investments to assure conformity to your allocation goals. We will provide you with single source real time data access to your current financial picture. We will provide scheduled and systematic reviews so we can learn what has changed financially and personally so we can adapt and adjust the plan.