Building Economic Confidence

1 Clearing the Path

This is the first step we take together to clarify what wealth means to you. Looking beyond the numbers, we have an introspective conversation about your strengths, your financial fears, and your future. This step will provide a straightforward understanding of your objectives, the hurdles to overcome in achieving them, and the strategy to advance you on the path to achieving long-term goals.

2 Identifying Your Possibilities

This next step provides an in-depth assessment of you and all that has been put in place to date. By completing our Possibility Identifier, we are able to assess your current financial situation and how it aligns with your long-term wealth goals.

3 The Big Picture

Our outlook from the macro level delineates how your assets and liabilities are being used in your current financial plan. This identifies the strengths and weaknesses in your current approach and analyzes the impact and validity of using those strategies today and in the future.

4 Protecting Your Kingdom

We are dedicated to safeguarding your personal wealth from erosive factors. Here, we work to ensure that your monies are impermeable to death, disability, lawsuits, divorce, estate taxes, and unintended consequences of estate distribution.

5 Aligning Strategic Alternatives

Together, we will review and measure the impact of new strategies on your finances and your future. Our goal is to educate you to make well-informed decisions that will enable you to take action to improve your financial well-being.

6 Drawing the Blueprint

We construct a blueprint that allows you to track, measure, and verify your financial progress. The blueprint will also allow us to regularly re-evaluate your financial picture and provide new solutions to changes in your life. Here, we also discuss the growth of our relationship, setting up opportunities to create further wealth breakthroughs.

strategies FOR WEALTH