

THE HFA PROCESS

Time and time again, clients tell us how much better they feel when the path before them is clear – when obstacles are pushed aside and goals are well-defined.

That's what we do. We help investors get to their destination of financial wellness; lighting the path along the way, and keeping them on track.

That kind of advocacy requires winning your trust and acquiring a deep understanding of your situation. To make that happen, we utilize a detailed yet straightforward process for assessing your financial wellness and identifying goals.

PHASE 1: DISCOVER

It begins with discovery. We'll help you identify and prioritize your goals. Is it retiring comfortably? Sending your children to college? Passing wealth to your heirs or community? Probably all of the above. Setting goals is vital, but so is prioritizing and understanding the tradeoffs.

PHASE 2: DESIGN

With goals in hand, we can make informed decisions about the most appropriate investment strategy that will help you reach your objectives and is consistent with your risk tolerance. Long-term goals require long-term patience, so we encourage our clients to adopt a strategy they can live with.

PHASE 4: MONITOR & ADJUST

Finally, all investment strategies are monitored faithfully. Are you on track for each goal? Is the road to financial wellness clear? If not, what do we need to change?

PHASE 3: IMPLEMENT

Next comes implementing your strategy. What specific mix of investments will increase the likelihood of goal achievement?

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