

Initial Foundational Meetings

Discovery Meeting

Full of questions to learn about you, your goals, and what's most important to you.

Goal Planning Meeting

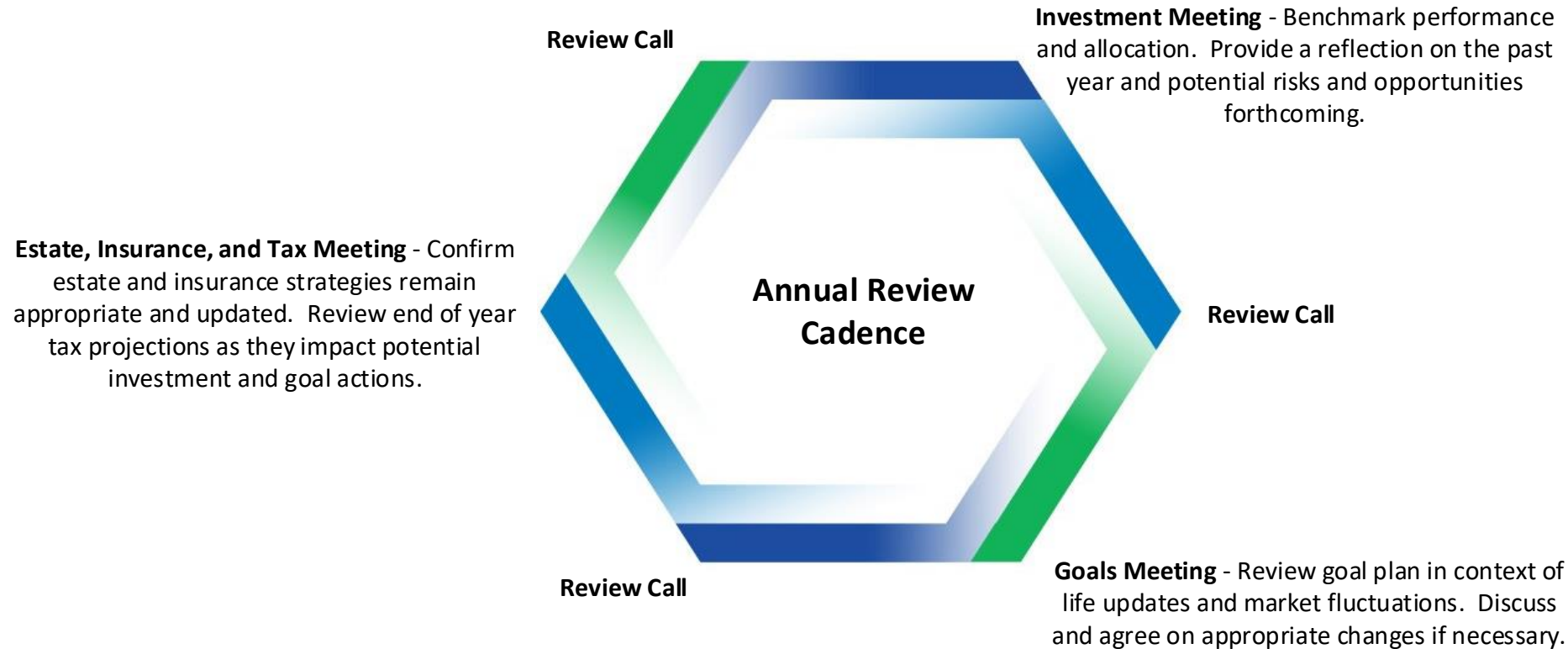
Develop and clearly articulate an actionable plan which accomodates life's everchanging demands.

Investment Meeting

Tie prudent allocations to appropriate investments that creates a portfolio designed to accomplish your goals with the least amount of risk.

Protection Meeting

Life's surprises can derail a plan that is inflexible or unprotected. Here we'll review insurance and estate planning strategies aimed at protecting what you've assembled.



Re-Discovery Meeting

A fresh discovery meeting to reevaluate all of life's changes. An opportunity to evolve or revolutionize our plan and where you want to go.

Goal Planning Meeting

Update or recreate your plan to capture an evolution or revolution in your thinking and goals for the future.

Investment Meeting

Dedicated time to understand what changes have taken place and what changes may be coming based upon the latest research and industry evolution.

Protection Meeting

A thorough reassessment of all estate and insurance strategies in place to make sure they withstand the latest legal shifts and reflect your revised goals.

Every 3 - 5 Year Re-Discovery Process