



Charting Your Way to Wealth

Grow your wealth, protect your hard work and choose how you want to be taxed SM

Welcome aboard! This map outlines the steps we will take to optimize your financial situation. Charting your wealth will accommodate your changing needs. At each stage in the process we can find our location on this map and plan our journey forward.

Introduction:

Chart your progress in all four types of assets: financial, human, intellectual and civic.

1

2

Set financial goals:

Set specific and quantifiable goals and prioritize them. Agree on client's and advisor's responsibilities.

3

Gather relevant information:

Gather objective and subjective data through interviews, education and examination of documents.

4

Analyze the data:

Identify strengths and weaknesses of your present financial situation as they affect the ability to achieve goals. Revise as necessary.

5

Design:

Create a set of customized strategies tailored to your circumstances and goals, including alternative ways of achieving these goals. Draw on outside experts as needed. Obtain your approval.

6

Implement:

Help you acquire the financial products and services needed to put the plan into action. Draw on outside experts as needed. Keep you informed of progress.

7

Communicate:

Establish a regular communication schedule for you and the advisor team.

8

Monitor your course:

Assess performance of all implemented vehicles. Optimize for changes in your situation and the financial environment.