



Wealth Road Map Formula



1 Discovery

Throughout our scheduled Wealth Strategy calls and Annual reviews, we will discuss your complete financial picture. When we identify any Critical Financial Events, we will work with you to develop a custom-tailored solution to ensure you are prepared for the road ahead.

2 Collection and Analysis

We will work with you, members of our Advanced Wealth Planning team and your other professional advisors (where required) to collect the information needed to develop a plan to address your goals.

3 Educate, Communicate, Translate, and Guide

We help you to understand the options that are available to you and the benefits and potential drawbacks of each potential course of action.

4 Implement

Once the plan has been developed, we will help you to put the recommendations into practice.

5 Review and Monitor

We provide regular reporting and reviews.