FINANCIAL PLANNING

PROCESS

BEYOND BALANCED
FINANCIAL PLANNING

01

Intro Meeting

A "get to know you" meeting where we explore whether we're a good fit for your needs. We'll mutually agree to work together.

02

Discovery

Focusing on your concerns, goals, and desires will allow us to understand your unique needs and objectives. (60 minutes)

03

Get Organized

We will collect any information we need while helping you sort through your financial life to get organized. (90 minutes)

04

Explore Options

Analyzing and evaluating your current financials together using our financial planning software. (60 minutes)

05

Plan Delivery

We present our financial recommendations. The goal is to commit to implementing the top 1 or 2 recommendations. (60 minutes)

06

Ongoing Financial Planning

We will implement the remaining financial planning recommendations together and meet quarterly to ensure that we are making progress. (60-90 minutes every quarter or as needed)

- Liquidity
- Savings
- Insurance
- Business Equity
- Retirement Accounts
- Investment Mix
- Real Estate
- Debt Repayment
- Personal Spending
- Financial Independence
- Estate Planning
- Taxes