OUR PROCESS

YOUR PARTNER IN MANAGING WEALTH TO ALIGN WITH YOUR VALUES

INITIAL MEETING

- Build rapport and discover/clarify goals
- Balance sheet review
- Decide the scope of client/advisor relationship
- Receive free estimate

PLAN DESIGN AND CONSTRUCTION

- We construct a web-based financial plan - meaning you get access and all numbers stay up to date
- Analysis includes: spending/cash flow, liquidity, retirement, investment, tax, insurance, estate, children's education, etc.

PLAN DELIVERY MEETING

- Review your current financial picture
- Receive recommendations
- Financial independence projection
- Analysis of plan optimization strategies

IMPLEMENTATION AND ONGOING SUPPORT

- Phone and email support as needed
- Semi-annual face-to-face or virtual meetings
- Continuous plan updates as life changes
- Portfolio monitoring, rebalancing, and recommendations

LifePoint Planning

CFP
CERTIFIED FINANCIAL PLANNER