3-Step Sales Process

Step 1: 30 Minute Introductory Call

We want to know what is going on in your financial world that is sparking this conversation and we want to know your dream and goals.

Step 2: Information Exchange

We will send you a request for information as we need to see your financial life on paper. The more information you provide us, the more value we can provide you.

Step 3: Discovery & Analysis

We meet for 60 minutes to do a deep dive into your financial plan. We will outline our recommendations in detail during this conversation.

CAPTRUST

Veronica Karas, CFP®
Senior Financial Advisor