

Our Planning Process

Creating a financial plan ensures a comprehensive approach



Get Acquainted Meeting

Initial client meeting to understand your personal & financial circumstances. This is a no pressure and no obligation meeting; ask your questions & we'll do the same.

Discovery Meeting

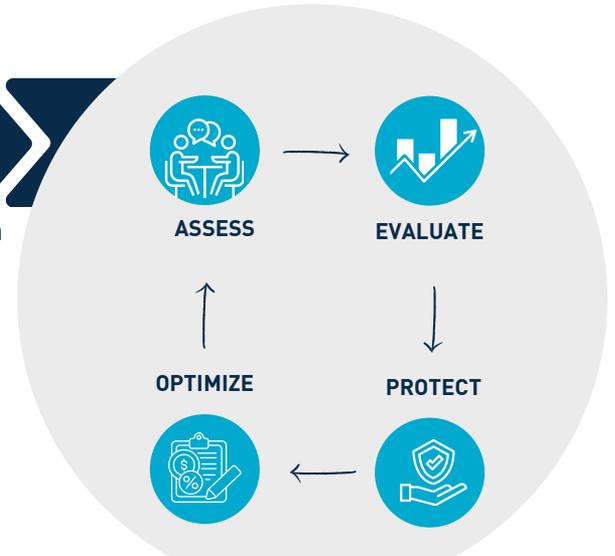
Work with our advisor team to identify & select your future goals.

Planning Meeting

Review your current financial scenario, and prioritize your goals & objectives.

Implementation Meeting

Review important recommendations for your personalized financial plan ensuring your questions are addressed for your financial success.



Ongoing Advice Model - Personalized and Timely

Monitor your plan and make updates periodically based upon changes to overall goals, objectives and life changes.

Making It All Work Together

Assess

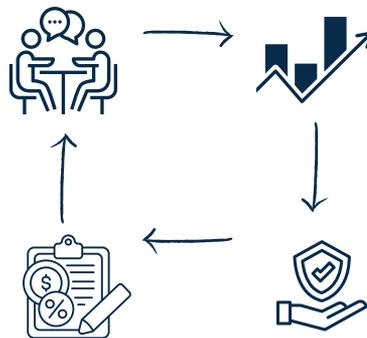
Retirement Planning, Cash Flow & Budget

We can help you balance short, mid and long-term liquidity needs with overall goals.

Optimize

Estate & Legacy Planning

We can help identify strategies, conduct analysis and make recommendations to help reduce future tax liabilities and transfer your wealth effectively.



Evaluate

Investment & Tax Planning

We can help define the timeframe for your goals, along with your tolerance for investment risk which play a critical role in the strategies we recommend for you.

Protect

Insurance Planning

We can help you identify insurance gaps and design strategies to help protect the ones you love, while documenting your solutions for future reference.

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