

# The Wealth Management Process



→ 45 days –





Presentation of investment plan

### MUTUAL COMMITMENT MEETING

One week —

Confirmation of commitment

### 45-DAY FOLLOW-UP MEETING

Organization of account paperwork

### REGULAR PROGRESS MEETINGS

Review of progress and implementation of advanced plan

## **INVESTMENT PLAN AND IPS**

Diagnostic of current situation, our recommendations for moving forward and details on our investing approach

### THE ADVANCED PLAN

Comprehensive evaluation of the entire range of financial needs with our recommendations for moving forward

# THE PROFESSIONAL NETWORK

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas

# PROFESSIONAL NETWORK MEETING

Our team of professionals applies its experience to evaluate all aspects of your financial situation and devise appropriate strategies