

## The wealth management process



#### DISCOVERY MEETING

Complete discovery process

### INVESTMENT PLAN MEETING

Presentation of investment plan

#### MUTUAL COMMITMENT MEETING

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 PROFESSIONAL NETWORK

Team of carefully selected professionals, each with broad knowledge and skill in key financial areas

#### THE ADVANCED PLAN

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

# PROFESSIONAL NETWORK MEETING

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