Our Process

PROCESS OUTLINE

STEP I - Analyze Current Position

- A. How Are Your Assets Invested Today
- B. Determine Your Current/Future Needs
- C. Discuss Your Goals
- **STEP 2** Formalize Investment Strategy
 - A. Determine Type of Investments That Meet Your Goals
 - B. Develop Strategy
 - Income, Growth and Income, Growth, Aggressive Growth
 - C. Risk Tolerance
 - Conservative, Moderate, Aggressive
- **STEP 3** Implement Strategy
- STEP 4 Monitor Results
- STEP 5 Review and Rebalance

OUR PROCESS

Step 5: Review and Rebalance



Step 1: **Analyze Current Position**



Step 2:

Formalize

Step 4: **Monitor Results**



Investment Strategy

Step 3: **Implement Investment Strategy**

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