

7 STEP WEALTH PROGRESSION PROCESS

"Understanding each of our client's unique financial situations and different needs is crucial to effectively planning for their objectives before and during retirement. " -Jack Grimaudo

1 DISCOVERY

I begin the process by learning everything I can about what is important to you. Often, it enables my clients to become aware of important aspects of their financial condition they had not considered. Once completed, together, we'll have developed a comprehensive plan that will highlight all your goals and objectives.

2 ASSESSMENT

Once I've determined your financial goals and objectives, my team and I will conduct a thorough analysis of your finances. Using specialized software for retirement planning, the analysis will show whether your goals and objectives are realistic and can be met under current circumstances.

3 RECOMMENDATIONS

We all have unique dreams and goals, so why should you rely on a cookie-cutter approach? We put together an investment and retirement plan that is as unique as your situation. In addition, we regularly meet with you to review not only our results, but to revise and update your plan to reflect life's constantly changing realities.

4 WEALTH PRESERVATION & ESTATE MAXIMIZATION

Sometimes holding on to our wealth can be harder than it's accumulation. We'll work just as hard to protect your wealth as we did to help you grow it. We believe in establishing a solid foundation upon which to build your nest egg.

5 CORPORATE MAXIMIZER

We understand that your business is the culmination of your life's work, so we'll work with you to ensure its prosperity. Through our disciplined investment philosophy coupled with our comprehensive market research, we work to grow the fruits of your labour while making sure to try and avoid any pitfalls. Our tax-efficient investment strategies will also help reduce your company's tax exposure and allow you to keep more of what you earn.

6 REVIEW

Clients are met with on a regular basis to review their retirement plan and investment accounts. The goal is not only to review, re-balance or re-structure, the goal is to make sure that the client's needs have not changed since previous meetings. We live in a fast-paced world and goals and needs can change at a moment's notice.

7 FAMILY & FREINDS

In appreciation of our client's confidence and trust, I extend my progressive planning process to all of my client's families and friends to make sure that circles of influence are well taken care of. Our doors are open to help, guide and advise our clients their friends and family, in making the best financial decisions in the quest to attain their retirement goals.