

The Five Step Client-Focused Approach

1. Determine Your Goals, Needs and Priorities

The first step of the approach is to understand your financial goals, needs and priorities. Each person's story is different and I need to hear yours. This will help determine whether I can provide what you are looking for and whether I can meet your expectations. This is an important part of ensuring a long-term relationship.



2. Analyze Your Current Situation with Respect to Your Goals, Needs and Priorities

I will then gather all quantitative and qualitative information related to your current situation. In other words, I am going to ask a lot of questions. At times, it may seem the questions are not directly related to the matter at hand. Often, there are connections and consequences of one financial decision on another – so it is important I have a complete understanding of your specific, personal financial situation before I make any recommendations.

3. Provide You with Suitable Strategies to Help You Meet Your Goals

I will thoroughly review and analyze all of your information to determine the strategies best suited to you. I will communicate and discuss this with you in a clear and concise manner – and answer all questions you may have.

4. Implement Your Personalized Strategies

Through thoughtful conversation we will discuss and mutually agree on implementation action, responsibilities, and time frames. I will then act to implement the approved recommendations.

5. Monitor Your Plan

We will agree on a timeframe for monitoring and evaluating each of the financial and insurance strategies based on your goals, needs and priorities. We will review and assess your progress, update your current situation, and clarify your goals and priorities to determine and discuss any necessary revisions to your plan.

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