Our Path to Purposeful Wealth Management

A deliberate 5 step process to identify, evaluate, and support your life goals

1

Discovery

Determine if we're a good fit with a casual conversation about your situation in relation to our expertise and approach.

2

Onboarding

As a new client, we'll create a strong foundation through a customized wealth planning dashboard, data collection, and account transfer support.

3

Confidence & Clarity

We will meet as a team to review your values, goals, and vision to design a clear, customized plan aligning your wealth to your financial purpose.

4

Implementation

Guided by our experience, we pierce through financial inertia to put your plan into motion. Key attributes of this step include managing your assets and implementing agreed upon action items.

5

Monitor & Revisit

Throughout the year with fiduciary care, we'll oversee your financial plan, probing for blind spots, identifying opportunities, and keeping you accountable and updated while celebrating milestones along the way.

Counterweight
PRIVATE WEALTH