THE GUINAN
FINANCIAL STRATEGIES GROUP
of Wells Fargo Advisors

Service for Friends and Family

As a service for our clients, we make ourselves available as a sounding board for any friends or family members. When someone you care about needs financial guidance, we will make time to meet with them and point them in a helpful direction.

How can we help?

As financial stewards, we always want to make ourselves available as a sounding board to those you care about – even if it's to confirm that they're on the right track. That is why we created a service for friends and family.

How to access our service

Step 1

- If a situation arises where an individual may need assistance with a financial matter such as retirement planning or investing, you are welcome to share with them your experience in working with our practice

Step 2

- Ask the person if they would like to meet us – and with their permission, call our office to provide us with their contact information
- You may also, with their permission, share any high level information that may be helpful

Step 3

- We will call them to introduce ourselves and talk briefly about their needs
- We will send them an introduction kit about our practice and then call to schedule a meeting or phone conference
- The purpose of the meeting is to gain a solid understanding of their goals, objectives and current situation so we may provide them financial guidance
- Following the meeting, we will determine what are the next steps
- We will answer any question that we can. We may also direct them to other resources as necessary
- If they need ongoing assistance, we will mutually determine if we begin a working relationship

We are here for you and anyone who may need guidance with a financial situation. You are always welcome to call us.

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