

Our process

We take a life-centered approach to building your comprehensive wealth plan. We get to know you, our goals and dreams. Only when we truly understand everything you desire for yourself and the next generations can we truly help build your financial roadmap for the future.

1

Discover

- Learn your story: where you have been, where you are, and where you are going
- Discuss values, goals, transitions, hopes, priorities and concerns
- Understand your perspectives on important money issues
- Uncover the resources available to you today and that will be available to you in the future

2

Propose

- Develop a personalized plan around your current and future lifestyle and legacy goals
- Review and offer guidance on your assets, cash flows and liabilities
- Make specific recommendations related to all aspects of your financial life
- Address uncertainties and help design an asset protection strategy

3

Implement

- Initiate your investment plan following mutual agreement
- Execute solutions in an independent, objective and unbiased manner
- Phase in the investment recommendations focusing on reducing costs, taxes and risk
- Collaborate with other trusted advisors—CPAs, estate planning attorneys, etc.

4

Review

- Review meetings as necessary
- Meet with you to reconfirm your goals and cash flow requirements
- Meet to make appropriate adjustments in response to market conditions, tax laws, and regulations, as well as in your and your family's lives
- Review estate and tax plan for strategic opportunities

“If you fail to plan, you are planning to fail.”

—Benjamin Franklin

Wells Fargo Advisors and its affiliates do not provide legal or tax advice. Any estate plan should be reviewed by an attorney who specializes in estate planning and is licensed to practice law in your state.