

Discover our unique six step process  
***The Net Worth Maximizer™***

**Step 1**



**Personal  
Discovery**

**We gather your financial information and measure your tolerance for risk, while discovering your current net worth strategies, goals, strengths, and concerns**

**Step 2**



**Graphic  
Overview**

**We create and review with you an analytical report of your portfolio's current status, including asset allocation, sector weightings, and the effects it has on your net worth**

**Step 3**



**Strategy  
Design**

**We develop a financial strategy designed to bring together all of the resources appropriate for your portfolio**

**Step 4**



**Action  
Strategy**

**We help you develop and execute a plan for implementing the portfolio strategy unique to your individual objectives to help maximize your net worth**

**Step 5**



**Analytical  
Observation**

**We work with you to monitor your success in meeting the goals and objectives of your individual strategy**

**Step 6**



**Net Worth  
Measurement**

**We review with you the progress of your portfolio versus your goals based on appropriate benchmarks**