Parsons FINANCIAL GROUP

iA Private Wealth™

OUR FINANCIAL PLANNING STEPS

FOR PRIORITIZING SUSTAINED FINANCIAL SUCCESS

1

The initial meeting is where we will get to know you and determine how our valued professional advice can help plan for your unique financial needs. You will meet our team and gain an understanding of our services.

2

The discovery meeting is where we will collaborate to discuss your current financial situation, assess your risk tolerance, and examine your short-term and long-term financial goals and objectives.

3

With the information gathered from our meetings, our team will consider a financial plan that aligns with your unique lifestyle and objectives.

4

We will develop and present to you your personalized financial plan, tailored to meet your individual goals for building a strong financial future.

5

We will then put your wealth plan into action.

6

We will regularly monitor the development of your wealth plan to ensure it continues to meet your needs during the ever-changing circumstances of your life. We will regularly communicate with you regarding the status of your accounts. We see our clients on an as needed basis, or annually at a minimum.