Personal Financial Planning

WHAT IS PERSONAL FINANCIAL PLANNING?

It is a process that involves identifying needs and objectives, establishing priorities based on your values, and implementing options.

* Your plan may be implemented through the financial institution of your choice.

Tax and legal services are not offered by The Wealth Consulting Group, WCG Wealth Advisors, LLC, LPL Financial or affiliated advisors.

Periodically Review and Revise

- Reassess Objectives & Goals
- Reassess Strategies

Gather Your Information

- Financial Documents
- Collection & Review
- Data Verification

Implement Your Plan*

- Investments
- Insurance
- Accounting
- Legal

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Set Up Your Wealth Website

- Monitor Accounts
- Track Cash Flow
- UpdateDocuments

Financial Planning Process

Identify Your Visions & Goals

- Initial Consultation
- Refine Goals

nt Vour Plan

Present Your Plan

- Review Action Plan
- Schedule Implementation
- Final Review

Prepare Your Plan

- Modeling "what if" Scenarios
- Strategy Session
- Investment Analysis

