Our Process

We investigate your financial situation through discussions with you, your financial, tax and legal advisors, resulting in a plan and recommendations which assist you in attaining your goals and dreams. This plan is regularly revisited and updated throughout your lifetime to ensure that it reflects your changing lifestyle and aspirations.

Step 1: We meet and discuss your current goals and dreams, as well as your financial situation

Step 2: Any additional information needed is gathered from you and your advisors

Step 3: You are provided with a thorough analysis of your financial situation and your ability to achieve your goals. Additionally, you receive an estate analysis and (if applicable) an insurance analysis. These analyses are accompanied by specific recommendations that assist you in meeting your goals in the most tax-efficient manner possible.

Step 4: Your plan is monitored and updated based on life events through meetings with your estate planning team.