



Discovery Meeting

Complete discovery meeting.

Investment Plan Meeting

Presentation of investment plan.

Mutual Commitment Meeting

Confirmation of commitment Platform, portfolio mandate and advisor documentation.

Follow-Up Meeting

Completed account paperwork and organization of regulatory requirements.

Regular Process Meeting

Review of progress and implementation of advanced wealth management strategies

Investment Plan and Approach

Diagnostic of current situation, our recommendations for moving forward and details on our investing philosophy, portfolio construction and management strategies.

Advanced Wealth Management

Comprehensive evaluation of the entire range of financial needs and our recommendations for moving forward.

Advanced Planning Team

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas.

Advanced Planning Meeting

Our team of specialists apply its expertise to evaluate all aspects of your financial situation and devise appropriate solutions.