

Our Six Step Process

Comprehensive planning is the core of what we do at Eagle Wealth Management. Through years of one-on-one client interactions, our six step process has emerged as the best way to help our clients reach their goals.

- 1) **Introduction:** In the first step, we spend time learning about each other. In particular, we discuss your immediate needs, concerns and what you are looking for in a wealth management specialist. We also explain how we work, how we are paid and the expectations we have for our clients. Together, we determine if we would like to move forward with the planning process.
- 2) **Discovery:** This step is all about listening and in-depth conversation. For us to create a successful financial plan for you, we must first have a deep understanding of your goals and values. We'll ask many questions and gather information involving all aspects of your financial life in order to build a unique, customized plan.
- 3) **Analysis:** At this stage, we analyze your information to assess your current situation and determine what you must do to reach your goals. With your permission, we often collaborate with your other trusted advisors (such as CPAs or attorneys) to ensure we are all focused on the same path to your success.
- 4) **Solutions:** At this meeting, we present recommendations that address your specific concerns and goals. We educate and empower you with the confidence and clarity needed to make informed decisions about your future. Together, we select the top priorities and choose the best opportunities for you to reach your goals.
- 5) **Implementation:** Once we decide the appropriate path to take, then we implement the recommendations. This can be a lengthy process in which we are in frequent communication, ensuring any changes occur accurately and in a timely manner. After the plan is implemented, we meet once again to make sure you fully understand any changes made and how we will move forward in the future.
- 6) **Monitoring:** The key to our planning process is regular communication and monitoring of your plan. The plan we have created will adapt as your life changes, markets change, and laws change. We work to anticipate significant events when possible, and help you work through the unexpected events.

