FIVE STEP PROCESS

ANCHOR FINANCIAL

01. DISCOVERY SESSION

- Discuss financial needs, goals, income, expenses, assets, liabilities, etc.
- Get to you know you and understand what is important to you.

02. PROPOSAL SESSION

- Present financial plan to include net worth, retirement & cash flow analysis, investment recommendations, etc.
- Take all the pieces of your financial life and create a comprehensive strategy moving forward.

03. ONBOARD SESSION

- Complete account opening, transfers and execute investment plan.
- Personalize online access, statements and service plan.

04. DEEP DIVE SESSION

- Extensive analysis and implementation of estate planning, insurance planning, long term care planning, education planning, etc.

05. REVIEW SESSIONS

- Review portfolio performance and market outlook.
- Review financial plan strategy, track and update goals.

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