WEISS
WEALTH STRATEGIES
of
RAYMOND JAMES

a disciplined, consistent process

WE HAVE A CLEAR PROCESS TO UNDERSTAND YOUR GOALS AND DEVELOP APPROPRIATE RECOMMENDATIONS

5 DAYS

1. Discovery Process
Identify your goals, values, dreams, special concerns/challenges

10 DAYS

2. Develop Investment Strategy
- Determine risk tolerance
- Analyze current investment portfolio
- Develop asset allocation strategy
- Portfolio construction

20 DAYS

3. Investment Strategy Meeting
In-person meeting to present recommended investment strategy

30 DAYS

4. Execute Investment Strategy
- Open new accounts
- Transfer existing assets
- Conduct trades to execute agreed-upon investment strategy

65 DAYS

5. 45-day Follow-up Meeting
In-person meeting to discuss:
- First statements
- Organization of paperwork
- Set up online account access (and review online resources)
- Schedule ongoing communication

90 DAYS

6. Review Comprehensive Wealth Management Plan
- Comprehensive financial planning
- Retirement planning
- Credit and lending
- Insurance and liability management
- Education planning
- Business succession plan
- Charitable giving
- Family dynamics
- Estate planning

100 DAYS

7. Wealth Management Plan Meeting
In-person meeting to present comprehensive wealth management solutions

ONGOING

8. Execute Wealth Management Plan
Ongoing execution of wealth management solutions

9. Ongoing Evaluation of Investment and Wealth Management Plan
Develop schedule for review meetings

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