



PREMIER WEALTH MANAGEMENT

POWERED BY THE FIVE F'S

HIGH-IMPACT TAILORED PLANS CUSTOMIZED FOR YOUR CLIENTS

FINANCIAL PLANNING PROGRAM

Our 7 step process allows the planner to check in with the advisor as the process takes place. The final revision occurs after the advisor meets with the client and then iteration 3 can be created if any changes are needed. This process makes it easy to turn complex plans and financial data into a clear and simple picture with powerful itneractive visuals and repoorts.

01

Core

- 1 Hour Consulting Call
- 30 Minute Review Call
- Annual Plan Review*

02

Comprehensive

- 1 Hour Consulting Call
- 30 Minute Review Call
- Annual Plan Review*
- Access to Plan Manager

03

Advanced

- 1 Hour Consulting Call
- 30 Minute Review Call
- Annual Plan Review*
- Access to Plan Manager
- Cash Flow Analysis
- Asset Map

Internal Use Only.

Investment Advice Offered through Strategic Financial Concepts, LLC, a registered Investment advisor.