OUR WEALTH MANAGEMENT PROCESS

KORSZEN FINANCIAL GROUP of RAYMOND JAMES®

Rudd International WEALTH ADVISORY GROUP OF RAYMOND JAMES®

INITIAL MEETING

- Learning about you, your vision, values, what's important to you
- Understanding any special concerns and challenges
- Discovering how we can add value
- Communicating our wealth management process

IMPLEMENTATION

- Transfer assets, as needed
- Execute agreed-upon strategy
- Coordinate with CPA

INITIAL MEETING	7-14 DAYS	20 DAYS	ONGOING
UNDERSTAND & CONNECT	DESIGN & SIMPLIFY	IMPLEMENT	MONITOR & MANAGE

INVESTMENT STRATEGY

- Determine risk tolerance
- Gather statements and data for analysis (Financial Inventory worksheet)
- Perform Cash Flow Analysis
- Review Balance Sheet (Net Worth)
- Analyze current investments
- Develop investment strategy
- Presenting investment proposals
- Discussion of fees
- Opening new accounts

60-90 DAYS:

WEALTH MANAGEMENT PLAN

Coordinate with other advisors

- Retirement Planning in GPM
- Insurance and risk management
- Business succession planning
- Charitable giving
- Estate planning and family dynamics

ONGOING REVIEW PROCESS

- Regular financial reviews
- Monitoring of wealth management plan
- Keeping up to date on life changes, needs, and desires

45 DAYS:

FOLLOW-UP MEETING

- Review first statement
- Investor Access online
- Schedule for future reviews

1314 East Venice Avenue // Suite A // Venice, FL 34285 // 941.412.1400 // korszen.com