SIGNATUREFD

Financial Design for Life

WEALTH BLUEPRINT PROCESS

At SignatureFD, we design and execute an innovative and comprehensive wealth program for you, empowering you to use your wealth to live a great life. Our belief is that any financial design must start with life as the central focus and then move outward to the solutions that fit your specific needs.

We have found that you have to decide what is important before deciding what to do. And that is exactly what we will help you with. Through our innovative Wealth Blueprint Process, our experienced team will help you discover your life goals, identify how best to employ your wealth to achieve those goals, and implement strategies for your success.

We designed our Wealth Blueprint Process to help you simplify your financial life, save time, secure your future, and reduce your risk. Basically, to provide you peace of mind and comfort so you can focus on living a great life and achieving your goals and dreams. It will be an educational and enjoyable experience for you where we put as much of the work on our shoulders as possible.

Finding the right financial advisor is an important decision. We know that sharing your confidential financial information, not to mention your hopes and dreams for the future, can be intimidating and we take that responsibility very seriously. Through a series of meetings, questionnaires and in-depth discussions, we will help you articulate your needs, goals and dreams. On your terms; in your time frame.

It is a long-term, ongoing process, but most importantly it is a relationship. A relationship based on trust. And as that trust grows over time, the process continues to evolve. As we get to know each other better, we will continue to refine your personal financial design to ensure that your wealth is working for you to accomplish your goals.

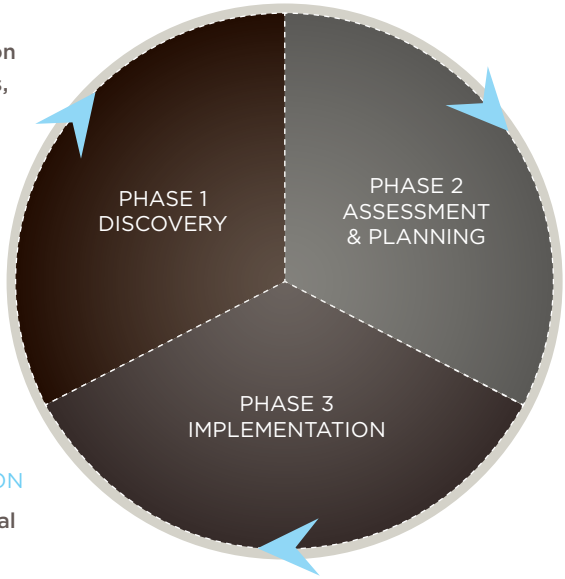
As with everything that is customized, this process will not be exactly the same for everyone. We are not just talking about advice, a service or a product, but an entire, integrated wealth solution that is unique to you.

AT A GLANCE

At first glance, the Wealth Blueprint Process appears very simple because there are only three steps.

ONE :: DISCOVERY

Gathering new information about your wealth, values, vision and goals



TWO :: ASSESSMENT & PLANNING

Analysis and development or refinement of your entire financial design, including all wealth management disciplines: Asset Management, Asset Protection, Cash Flow, Debt and Tax Management, and Wealth Transfer Planning

THREE :: IMPLEMENTATION

Execution of your personal financial design

However, underlying the apparent simplicity is a complex system that, when repeated over time, deepens and refines your financial design to ensure that your wealth is working to help you to live a great life.

FINANCIAL FOUNDATION

The fact of the matter is, when you come to us, you probably have an accumulation of different investments, insurance, debt, cash flow, tax and estate plans. But we don't know what shape they are in or if they are aligned with your goals. So we start by gathering all of that information and doing a thorough analysis of your wealth, both to obtain a clear and accurate financial picture and to assess potential risks. Finally, we put a prioritized action plan in place to address your most pressing issues and needs and to get your financial house in order.

The prioritized action plan lays the groundwork for our future work together and provides you additional confidence and control over your finances.

DESIGNING A GREAT LIFE

When it comes to goal setting, we have found that most people struggle to get past their most obvious needs and are unclear about what they really want out of life. But your life, and what you want out of it, is at the core of what we do. Our goal is to ensure that your wealth works to help you live confidently, fully, and purposefully.

As a result, we believe that one of the essential elements to making wise decisions is having clarity about what is important to you, where you are going, and what you want to accomplish. Basically, what does "a great life" mean to you? Throughout our relationship, we work with you to articulate your values and translate those values into a vision, meaningful goals, tasks and strategies that will enhance your life and act as the benchmark for your personal financial design.

The one thing about life that never changes is that things always change. As such, this process is ongoing. We will be there for you, both to implement the necessary steps and to respond to the inevitable changes that will occur over time.

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