Attleboro Wealth Management Financial Planning Process

Attleboro Wealth Management financial planning process follows the Certified Financial Planning Board of Standards process in an in-depth look at a client's financial needs, goals and issues. The work we accomplish in this process ensures the highest probability our clients will reach their short- and long-term financial goals. We believe so strongly in this process, every client of ours receives their own secure and encrypted online financial planning portal so they have on demand access to their plan 24 hours a day, 7 days a week.

We conduct an eight-week process that is a comprehensive "deep dive" into all financial matters in our client's lives. Focusing on goals and objectives, investments, tax issues, insurance needs, wills and estates, and retirement planning, the professionals at Attleboro Wealth Management develop, implement and monitor a strategy and review it with them at least annually.

Goals & Objectives

Retirement
Education
Travel
2nd home
Weddings
Caring for loved ones

Investments

Efficiency
Appropriateness
Interrelations of investments
Applicability to the client's goals and needs

Tax

Efficient strategies for managing taxes in retirement
Tax management during working years
Tax strategies for business
Tax strategies for the self-employed

Insurance

Life
Long term care
Disability
Property and casualty
Liability

Wills & Estates

Wills
Powers of Attorney
Health Care Directives
Trusts

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WEALTH MANAGEMENT

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This eight-week process generally consists of four 1 to 2-hour meetings held every two to three weeks. The meetings are scheduled ahead of time with a clear agenda that is developed by the planner and the client based on the client's immediate needs and most pressing issues. While the focus areas of each meeting will change, depending on the needs of the client, a typical eight-week process looks like this:

Week 1: (Meeting #1) Identify the client's needs, goals and issues. Establish the client and planner relationship, identify and agree on responsibilities of each party.

Week 2: Gather information required for the analysis. Responsible Party: Planner (Primary) and Client

- Investment Statements
- Income and expense information
- Wills and other legal documents
- Life, property and casualty, Long-term care, liability, disability & other insurance documents
- Tax returns
- Retirement plan documents and statements
- Pension statements
- Social Security Statements
- Mortgage and other debt statements

Week 3: (Meeting #2) Review information supplied by the client to ensure mutual understanding and agreement among all parties. Re-affirm or re-establish priorities of needs, goals and issues.

Week 4: Identify potential issues, risks and develop solutions to meet objectives for the client's immediate focus or issue. Responsible Party: Planner(Primary) and Client

Week 5: (Meeting #3) Present findings for the client's immediate focus or issue. Present strategies to fulfill needs, help achieve goals and address issues. Discuss implementation and monitoring of strategies. Responsible Party: Planner(Primary) and Client

Week 6 & 7: Identify potential issues, risks and develop solutions to meet objectives for the client's secondary focus or issues. Coordinate with other professionals, i.e CPA, Attorney, etc. Responsible Party: Planner(Primary) and Client

Week 8: (Meeting #4): Present findings for the client's secondary focus or issues. Present strategies to fulfill needs, help achieve goals and address issues. Determine implementation and monitoring of strategies and responsibilities. Responsible Party: Planner(Primary) and Client

Meetings will take place at our office location, or by web conference call.