



ALBRITTON FINANCIAL SERVICES, INC.

## **The Planning Process**

### **A Roadmap for Your Financial Journey**

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#### **Step 1: Discovery**

- ✦ Meet face-to-face and learn more about one another
- ✦ Lead us closer to understanding your mission, vision, values and goals
- ✦ Discover the *What* and *Why* in your decision making process

#### **Step 2: Data Collection**

- ✦ Review, discuss and organize your financial statements and documents
- ✦ Revisit your goals and motivations

#### **Step 3: Present Plan**

- ✦ Discuss all the issues that impact you so you can make informed, rational decisions
- ✦ Tackle the *Who* and *How* in achieving your objectives

#### **Step 4: Implementation**

- ✦ Review your plan and answer questions
- ✦ Collaborate and utilize various strategies in accordance with your wishes

#### **Step 5: 60 Day Review**

- ✦ Introduction to your review
- ✦ Explain new statements and help organize records

#### **Step 6: Ongoing Reviews**

- ✦ Discuss your life, family and interests
- ✦ Review and update your goals, financial plan, strategies, etc.
- ✦ Listen, educate and guide you on your financial journey