THE EWM NEW CLIENT EXPERIENCE

ONBOARDING

Client Portal Access

Information Gathering

◇

Risk Assessment

Signatures

◇

Account Openings

Transfer of Assets

INVESTMENT STRATEGY

Investment Goals

Investment Planning

◇

Income Needs

◇

Verify Risk

PLAN PRESENTATION

Retirement Projections & Plan Results

Portfolio Recommendations

◇

Coordinate with CFP® Professionals

Cash Flow Planning

◇

Meeting Schedule Presented

WHAT TO EXPECT NEXT!

With Econ Wealth, you're with a team where someone you know will answer the phone, be available, help you with household chores (seriously!), and create a customized financial experience for you, then Econ Wealth Management may be exactly what you're looking for. As a **FIDUCIARY**, our goal is to provide you with the peace of mind you deserve while being your guide on the journey to your goals and dreams. You will expereience the highest level of service from our team during your lifetime as a client.

Econ Wealth Management

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