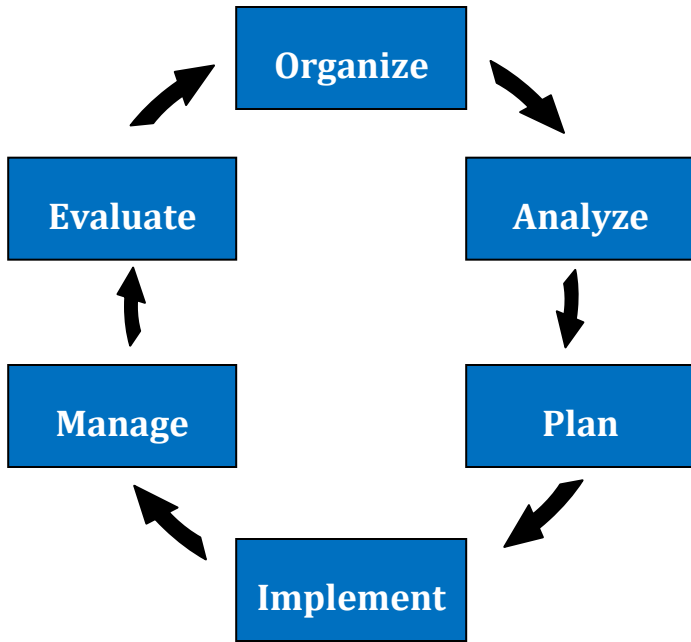


Steps to Financial Planning

Our Financial Planning Process is Built Around Six Principles

Whether you're doing so consciously or not, a plan must have all six elements to be successful. In our years of experience, we've learned a lot about what makes a plan succeed or fail.



We bring structure and discipline to your financial plan. We are professional financial planners dedicated to your success and will provide ongoing accountability where you need it most, ensuring nothing is neglected.

Get Stared Today:

William R. Sylvia Jr.
LPL Financial Planner

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How Our Six Principles Work:

Organize

We gather all the information necessary to make prudent and educated decisions free of emotion. We will provide you with a helpful guide to help organize and prepare for your first visit.

Analyze

We work diligently to make sure we fully understand every aspect of a client's current situation and define reasonable goals for the future. Sometimes it is necessary to revisit this step several times to ensure the most accurate plan for the client.

Plan

Next we summarize the analysis and create an outline of the goals we've set, and the steps needed to be taken to ensure a successful achievement.

Implement

We work closely with our clients to help them implement every aspect of our plan. Our experience and organization ensures a seamless and convenient setup for clients.

Manage

Management cannot be done without a proper plan. Our structure looks to monitor:

1. Our progress to our specific goals
2. Whether we've strayed from our plan, and if it is a good trend or bad.
3. What should, and what should not, be changed to our plan.

Advance and disciplined planning is a client's best defense from stock market declines, investment losses and other significant financial events.

Evaluate

We provide structure to ensure financial decisions are rational and not influenced by emotions that can work to our detriment. The evaluation process involves making necessary changes, along with deciding when to avoid changes to the things that are still contributing to our success.

This process is free for all NEARI Members through our affiliation.

