

The Integrated Wealth Management Process™

"A holistic and evolutionary strategic planning program based on a conversation about your financial affairs for the rest of your life."

-- Jeff Davis, CFP™
President

Falcon Financial Management, Inc.

1

Initial Consultation

During our initial consultation, we'll evaluate your planning needs.

2

Unique Discovery Experience™

At this stage we will review your data and identify your goals and objectives.

3

Interactive Drafting Session™

During this meeting we will review different scenarios. Together we will develop a clear vision of your options and develop a draft of your plan.

4

Integrated Wealth Management Blueprint for Success™

At this point we review the final financial plan, discuss the steps to implement the plan, and begin the implementation process.

5

Implementation

Now Team Falcon takes your plan and puts it to work to achieve your goals. We will meet to bring you up-to-date on the status of your investments and answer any questions you might have.

6

Integrated Wealth Management Review™

This ongoing review allows us an opportunity to maintain an evolutionary strategic planning relationship and to revisit your original financial planning issues. We will adjust your plans to meet your needs.

