A Lifetime Process…

…Growing Together

PROCESS

During your first engagement, it is important for us to get to know one another a little. Dan will ask you a few questions to get a feel for your overall situation, but usually there is no need to get into great detail. You will also spend some time getting to understand more in-depth how Dan will be working with you and answer any questions you may have.

The next step involves you gathering up your pertinent financial affairs and getting those to Longs Peak Financial. At the same time you will be asked to complete a questionnaire(s) which delves more into who you are as a person or family in order for Dan to fully understand your situation and goals.

Your financial affairs will then be studied and put into an organized structure. A time will then be scheduled for you to review the structure of your affairs. This time will be used to ask questions, draw some general conclusions, hear some general observations and perhaps organizing you financially. It is important at this point to make sure all financial information is accurate.

The next step(s) will be to prepare various financial scenarios and test them for efficiency. There will be a number of topics which may come up. This step can take several meetings and can address a wide variety of topics, and differs according to each person or family.

If you elect to incorporate strategies, steps are then taken for implementation. This can take on a wide variety of applications.

Financial decisions in life never end. Once working together, the process of reviewing what has been done, implementing new actions, testing new possibilities and dealing with subjects as they unfold continues.

Dan's desire is to develop deep relationships with people he enjoys working with. He wants to support them in developing their financial well-being for a lifetime. By participating in a macro-economic approach to finances, he can provide long term value to his clients.