Girard Partners
Nurturing your wealth for life

Our Disciplined Process

an ongoing dialogue

We adhere to a highly structured process that is adapted to meet your goals. It is this ongoing dialogue and commitment to finding appropriate wealth management solutions that makes our client relationships so effective.

5 days – Discovery Process

Identify your goals, values, dreams, and special concerns/challenges

10 days – Develop Investment Strategy

- Develop risk tolerance
- Analyze current investment portfolio
- Develop asset allocation strategy
- Open new accounts

20 days – Investment Strategy Meeting

Discussion to present recommended investment strategy

30 Days – Execute Investment Strategy

- Portfolio construction
- Transfer existing assets
- Conduct trades to execute agreed-upon investment strategy
- Set up online account access and review online resources

60 Days – Follow-up Meeting

- Review first statements
- Organization paperwork
- Schedule periodic management plan meeting

90 Days – Develop Comprehensive Wealth Management Plan

- Comprehensive financial planning*
- Retirement planning
- Insurance and liability management
- Education planning
- Business succession plan
- Charitable giving
- Estate planning

90 Days+ – Wealth Management Plan Meeting

Meeting to present comprehensive wealth management solutions

Ongoing

- Ongoing execution of wealth management solutions
- Ongoing evaluation of investment strategy
- Develop schedule for review meetings

Financial plans may require a charge in addition to our asset management fee.

This represents a typical timeline. Because each client relationship is unique, timelines may vary depending on your specific circumstances.

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King of Prussia, Pennsylvania • Richmond, Virginia • Fort Myers, Florida