

Six Step Planning Process |

Designed to help you gain the confidence you need to focus on your financial goals. Financial Care Providers will chart your progress every step of the way as you move towards financial growth and well-being.

Step 1 | Introduction Phone Call

It starts with a simple phone conversation. This gives us the opportunity to learn more about you, what you are looking to gain from an advisory relationship, and to discuss the possibility of working together.

Step 2 | Get Acquainted Meeting

The Get Acquainted Meeting allows us to get to know each other better and to discuss in detail your goals and objectives. We educate you on our planning and investment philosophies so you can understand our process and the scope of our work together. We will uncover strengths, opportunities and weaknesses in our discussion. Based on these determinations, we will provide you with a fee structure for the relationship. If we decide to work together, we then establish an Engagement Agreement and move forward accordingly.

Step 3 | Discovery Consultation

Once an Engagement Agreement is established, we begin the Discovery Consultation to help you uncover, prioritize and realize your most important life goals. We will explore the opportunities, costs, benefits and tradeoffs of the choices that your financial life imparts. This is a thorough fact-finding session designed to review your life transition goals, income and expenses (cash flow), assets and liabilities, savings goals, insurance, and estate planning documents.

Step 4 | Financial Plan Delivery

At this step, we deliver the Financial Plan which includes: (where appropriate) your financial goals, balance sheet, detailed cash flow schedule, federal/state tax estimates, insurance summary, needs analysis in the event of disability, estate plan analysis, survivor need analysis, education funding analysis and planning recommendations. We examine the potential to reach your goals, based on your existing pool of resources. We then determine which actions will more closely align you with your objectives and create a timeline to get them implemented.

Step 5 | Implementation and Portfolio Design

After evaluating and fine-tuning the plan, we begin putting your plan to work for you. We review the approved action plan and move forward with your strategy.

Step 6 | Quarterly and Annual Reviews

Once your financial plan and investment strategy is developed and implementation begins, we don't just invest your money and put it on 'auto-pilot'. Instead, we set up Annual Reviews which can address areas such as: Investment Planning, Risk Management, Cash Flow/Income Tax Planning, Estate Planning and Debt Management, depending on your needs. We update our records on how your life has developed over time, and we monitor and adjust your plan to help ensure that we are tracking your progress towards your goals.

Please call me directly at 770-353-6333 if you have any questions about Charting Your Progress.

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