# Financial Planning Made Easy

GDS
WEALTH MANAGEMENT

*If you've never had a financial adviser before, it might seem a little daunting when we first sit down together. Here at GDS Wealth Management, we take the worry out of investment planning by offering a complimentary portfolio review. All it takes is a little time to evaluate the hidden potential of your assets.*

***Here is our 6-step financial planning process:***

## 1. We MEET - complimentary portfolio review

Our first meeting can be as in-depth or as brief as you prefer. You decide the level of detail. It's your meeting, so we will listen to your goals and investment aspirations before we talk about our philosophy. Typically, your first meeting takes less than an hour.

## 2. You GATHER all your account information

Now it's your turn. We ask clients to complete our financial plan questionnaire and provide as much information as possible. If you brought all your investment statements (such as IRA's, brokerage account, 529's, life insurance, etc.) to our first meeting, then you're halfway there.

## 3. We ANALYZE your finances from A to Z

Once we have the information, we'll conduct a thorough financial analysis of your assets and develop a financial plan within industry regulated guidelines. Your account will be reviewed by two members of our team in order to provide you with the highest level of service.

## 4. We DEVELOP your new financial portfolio

When our analysis is complete, we'll give you a detailed review of your finances with suggested improvements. The proposal is yours to keep, so you can take as long as you need to determine your next steps. We're always here to answer your questions.

## 5. We IMPLEMENT your approved recommendations

Only after approval is given by you, do we implement your investment recommendations. Everyone's financial situation is different, so depending upon the complexities of your portfolio, it can take up to 7 business days to consolidate your accounts. We'll keep you in the loop throughout the process.

## 6. We REVIEW your account, so you don't have to

But we're not done! Our proactive approach means that we reach out to you quarterly to keep your account in tiptop condition. Every three months, we either do a complete review of your finances or touch base by phone.



glen.smith@gdswealth.com

https://www.gdswealth.com