Financial Planning Made Easy

Glen D. Smith & Associates
RAYMOND JAMES®

If you've never had a financial advisor before, it might seem a little daunting when you first sit down together. Here at Glen D. Smith & Associates, 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. Let's TALK, 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 60 minutes.

2. GATHER all your account information[1]

Now it's your turn. We ask clients to complete our financial plan questionnaire and gather together 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. Our two-sets-of-eyes approach means that your account will be reviewed by two members of our team.

4. DEVELOPMENT of your new financial portfolio[2]

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 like to determine your next steps. We're always here to answer all your questions.

5. Leave it to us to IMPLEMENT your recommendations

Only when you say "go," do we hit the button, and 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 MONITOR your account, so you don't have to

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

1. Did you know? We recommend you bring any investment statements with you to the initial meeting, but it isn't critical.
2. Did you know? We never tell our clients what to do. We only provide information and solutions.

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