CARSON WEALTH

The Client Experience

A year in the life of working with us

Your Journey Starts Here

1

We conduct a **Discovery Meeting** to discuss your financial goals. We explain our financial planning and investment philosophy and discuss if our firm is a good fit for you.

2

Once you become a client, we start the **Discovery Process** where we collect data so we can create investment recommendations and draft your financial plan.

3

Attend Our Investment Implementation Meeting. We will discuss your financial investment recommendations and make any necessary changes based on your input.

4

We will present your **Financial Plan**, including "what if" scenarios and make any necessary changes based on your input.

5

We will provide comprehensive **Tax Planning** that's integrated with your financial plan. We will review your tax return annually and use proactive strategies to help reduce lifetime taxes, focusing on tax-efficient investments, distribution planning and Roth conversion planning, and adapting to changing tax laws.

6

We establish your personal **Annual Service Calendar** which addresses the investment management services, financial planning and tax planning services to be provided throughout the year to you.

7

Monitor Your Investments. Ongoing monitoring and reporting of your investments is a cornerstone of our process. We will report how your portfolio is performing and communicate results to you.

8

We Believe in Education & Building Community. We provide weekly newsletters, monthly planning updates, "as-needed" announcements, quarterly "women and wealth" newsletters, financial workshops and educational events for every stage of file, market commentary videos, quarterly webinars, and quarterly women's events.

9

Ongoing Client Review We will perform an ongoing review of your annual service calendar which includes year-round tax planning work and a continuous review of your financial needs and concerns.

Never Ending Support

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