The Individual Advocacy Process™

STEP 1:

Discovery Process™

Each client is driving towards having **One Best Financial Life®**. **Our Money Mind®** tool helps you and our planners understand how you think/feel about money. By incorporating **Honest Conversations®**, we get clarity about what a desired lifestyle looks like and what matters to you.

STEP 2:

Wealth Confidence Report™

Objective analysis leading to your **Funding Score** and understanding what deliberate action can be taken to help you stay on track towards your goals.

STEP 3:

Data Navigator™

A compilation of additional personal and financial data to get an accurate picture of today's finances.

STEP 4:

Wealth Builder Blueprint™

Introduction of your present plan and where you are today. By using our deeper analysis of specific financial goals, we develop a blueprint of steps to make improvements in your plan by creating your **Priority Action List**.

STEP 4A:

Protection and Estate Solutions™

Identifies and evaluates the risks to family and business of unforeseen and unplanned events.

STEP 4B:

Investment Portfolio Optimizer™

Use of EisnerAmper's professional tools, including our **Investment Viewfinder®** empowers our collaborative approach, helping you understand investment trade-offs and formulate priorities. Results lead to a customized portfolio tailored to the unique preferences of each individual.

STEP 4C:

Tax Efficiency Formula™

Review aspects of the financials to assist in minimizing current and future taxes.

STEP 5:

Client Guidebook

We only have **One Best Financial Life®**. Our process assures continual status checks towards existing goals and the development of new opportunities. We incorporate our industry-leading tools, Client Portal and **Guidecenter ™**, to provide clients on demand access to their entire financial life whenever and wherever they need it.

EISNERAMPER

WEALTH MANAGEMENT
CORPORATE BENEFITS