The Ideal Client

The Ideal Client is financially prosperous; Wants a well-organized financial life; Wants a coach to hold them accountable
Is serious about accomplishing meaningful goals; Sees the value in paying for on-going independent, objective advice. Cares about something bigger than self and values being part of a like-minded community

PARTNER — CLARIFY — EMPOWER

1 DISCOVERY

- Explore concerns, values, and goals
- Discuss planning options
- Learn more about Acord & Fong Wealth Strategies
- Determine Ideal Client fit

2 CLARIFICATION

- Formalize planning relationship
- Gather any missing documents
- Establish current cash flow (budget)
- Discuss risk tolerance and our philosophy
- Discuss insurance and estate planning needs

3 FORECASTING

- Visualize with an interactive financial plan
- Test for contingencies

4 ASSET ALIGNMENT

- Ensure all assets are invested in alignment with risk tolerance

5 PLAN PROTECTION

- Discuss plan contingencies
- Implement insurance strategies
- Review estate plan

6 COMMUNITY ENGAGEMENT

- Summarize Plan
- Confirm communication plan
- Financial Life Organizer
- Build the community

7 WEALTH & RISK MANAGEMENT

- Review and rebalance investments
- Review insurance coverages; Life, Disability and LTC
- Review estate strategy and beneficiaries
- Explore tax benefited investment strategies
- Annual Meeting

8 FINANCIAL STRATEGY REVIEW

- Review values and goals
- Update financial projection
- Create action plan to improve probability of success
- Annual Meeting