



Acord & Fong
WEALTH STRATEGIES



FINANCIAL STRATEGY REVIEW

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



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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



COMMUNITY ENGAGEMENT

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



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DISCOVERY

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



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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



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FORECASTING

- Visualize with an interactive financial plan
- Test for contingencies



ASSET ALIGNMENT

- Ensure all assets are invested in alignment with risk tolerance



PLAN PROTECTION

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

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EMPOWER

4

PARTNER

8

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