DAR Financial Planning Process

Value of Our Financial Planning Process
Creating a Financial Plan ensures a comprehensive approach with personalized advice and guidance along the way. Going beyond traditional investment advice, financial planning helps to organize and simplify your client's financial life.

Take Control of Your Financial World
In addition to our customized planning capabilities, by working with our firm, you will also receive a personal client website that allows you to organize, monitor and collaborate your entire financial well-being in one place.

01 02 03 04 05 06 07

STEP 01
Understand Your Personal and Financial Circumstances

STEP 02
Identify and Select Your Future Goals

STEP 03
Analyze Your Current Course of Action and Potential Alternative Course(s) of Action

STEP 04
Develop Your Financial Planning Recommendation(s)

STEP 05
Present Your Financial Plan and Recommended Next Steps

STEP 06
Implement Your Financial Recommendations

STEP 07
Monitoring Progress and Update as Needed

*For Internal Use Only

(724) 863-3420 | 311 Main St. Irwin, PA 15642

DAR Financial Planning Process

STEP 01

Fact Finding / Data Gathering / Completion of Intake Form (Advisor)
Collect Documents and FPE (Advisor)
Discuss and Identify Client Concerns and Goals (Advisor and FP Analyst)
Initial Data Entry into Planning Software (FP Analyst)

STEP 02

Identify, Select, and Prioritize Potential Goals (Advisor and FP Analyst)

STEP 03

Gather / Update Additional Information (Advisor and FP Analyst)
Analyze Financial Plan and Stress Test with Scenarios and What-Ifs (FP Analyst)

STEP 04

Design and maximize the potential for meeting the client's goals and risk solutions (FP Analyst)
Complete Plan Analysis and Prepare for Client Delivery (FP Analyst)

STEP 05

Present Financial Plan, Observations and Recommendations to Client (Advisor and FP Analyst)
Address Client Questions / Concerns (Advisor and FP Analyst)
Deliver Bound Financial Plan, Analysis and Invoice to Client (FP Analyst)

STEP 06

Identify, Analyze, Select and Recommend Actions / Products / Services (Advisor)
Address Implementation Responsibilities per Party (Advisor)

STEP 07

Determine when Plan Updates are needed and work with FP Team (Advisor and FP Analyst)

*For Internal Use Only

(724) 863-3420 | 311 Main St. Irwin, PA 15642