PACIFIC EXCEL WEALTH ADVISORS

WEALTH MANAGEMENT CONSULTATIVE PROCESS

Pacific Excel
WEALTH ADVISORS

DISCOVERY MEETING

Complete discovery process

Two weeks

INVESTMENT PLAN MEETING

Presentation of investment plan

One week

MUTUAL COMMITMENT MEETING

Confirmation of commitment

45 days

45-DAY FOLLOW-UP MEETING

Organization of account paperwork

90 days

REGULAR PROGRESS MEETINGS

Review of progress and implementation of advanced plan

THE CLIENT EXPERIENCE

SUPPORTING THE CLIENT EXPERIENCE

INVESTMENT PLAN AND IPS

Diagnostic of current situation, our recommendations for moving forward and details on our investing approach

THE WEALTH MANAGEMENT PLAN

Comprehensive evaluation of the entire range of financial needs with our recommendations for moving forward

THE WEALTH MANAGEMENT NETWORK

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas

WEALTH MANAGEMENT NETWORK MEETING

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devise appropriate solutions

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WEALTH MANAGEMENT FORMULA

WM = IC + AP + RM

WM (Wealth Management) =

IC (1)
(Investment Consulting)
+
AP
(Advanced Planning)
+
RM
(Relationship Management)

IC = INVESTMENT CONSULTING

Management of all investment elements to maximize the probability of clients achieving all that is important to them.

- Portfolio performance analysis
- Risk evaluation
- Asset allocation
- Assessment of impact of costs
- Assessment of impact of taxes
- Investment policy statement

AP = WE + WT + WP + CG

AP (Advanced Planning) =

WE (2)
(Wealth Enhancement: tax mitigation and cash-flow planning)
+
WT (3)
(Wealth Transfer: transferring wealth effectively; may not be within a family)
+
WP (4)
(Wealth Protection: risk mitigation, legal structures and transferring risk to insurance company)
+
CG (5)
(Charitable Giving: maximizing charitable impact)

RM = CRM + PNRM

RM (Relationship Management) =

CRM
(Client Relationship Management)
+
PNRM
(Professional Network Relationship Management)

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