**AIS Financial Journey:**

**Step 1- Gather the Data:**

At AIS Financial before we ever give advice, we first get to know you. Our objective is to create an individualized financial plan that focuses on your goals and objectives. Before we can begin to do that, we must first hear from you what you’re aiming to accomplish, where you are currently as well as who and what are important to you. We never give advice before we understand the whole picture.

**Step 2- Analyze the data:**

Once we have met with you and familiarized ourselves with your personal needs we begin a full review of your financial picture, which includes:

1. Comprehensive examination of your tax return. We don’t want to prepare your taxes; just help you reduce them if possible.
2. Examine the estate planning needs you have as well as ensuring proper design.
3. Creation of a full financial plan that monitors and navigates your success towards your goals and creates an in-depth understanding of savings needs for retirement, expenses, cash flow in retirement and overall progress toward your goals and objectives.
4. Development of a custom built actively managed investment portfolio that is properly allocated and managed to help you reach your goals & objectives.

**Step 3- Discuss recommendations:**

In this phase we discuss our findings and share with you the benefits of the changes and how if we were to work together, we would go about optimizing your situation. When this step concludes you will be able to decide if you wish to continue your current course or implement the proposed changes here with us.

**Step 4- Begin implementation:**

Partnership with AIS Financial begins, accounts get opened, assets transferred over, new investment portfolios are built, action steps of your financial plan begin, and we work side by side with you to ensure proper implementation.

**Step 5- Ongoing partnership:**

Once you become a client of AIS Financial, you will find that we pride ourselves on communicating with you on a regular basis. In addition to your regular scheduled review meetings, you will receive periodic check-in calls and educational articles that provide insights into items that are focal points for us here in the office.