

# Personal Financial Planning



**Tony Desch**, AIF®  
Financial Advisor



The long term goal with clients is for them to feel confident about where they are financially at every stage in their life journey.

## HOW I CAN HELP:

- Learn and listen to your life story
- Consider your entire financial picture
- Free up more of your time
- Continually review progress and make adjustments

# 360° HOLISTIC APPROACH TO PERSONAL FINANCIAL PLANNING

## UNDERSTAND & BUILD TRUST

Understanding your short and long-term goals and determining your risk tolerance

## ANALYZE & DESIGN

Analyzing your total financial picture and recommending a portfolio that suits your objectives

## IMPLEMENT & ENGAGE

Implementing your customized portfolio, discussing expectations, and coordinating other services

## MANAGE & REVIEW

Monitoring progress, conducting periodic reviews, and communicating adjustments

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**Our vision is to improve the lives of all we serve.**

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