FEE-BASED FINANCIAL PLANNING

Do You Have a Plan?

Not just an idea in your head about your current assets and a hazy image of your future, but a tangible, comprehensive document? If not, then you are missing a critical element of clarity, the very foundation on which to build peace-of-mind.

Advisors at Symphony Financial are planning experts. Our decades of experience as wealth management professionals enable us to ask the right questions and assess the relevant information necessary to develop a thorough, customized plan that addresses your unique situation, needs, and goals.

Why Have a Plan?

Engaging in the planning process tempers emotion through education. Clarity and knowledge about your finances provide you with critical information necessary to make sound decisions. Equipped with a plan, you will no longer be stuck finding a financial professional you hope will do the right thing.

We are not selling you a product when we build a plan – our sole goal is to figure out your goals and the most effective means to achieve them. Whether you eventually decide to implement the plan with us or take it to another advisor, you will have the necessary framework to get started. In addition, we are available on an annual renewable basis to adjust the plan.

The 3-D Planning Process

DISCOVER: During this phase we pose strategic questions to uncover your vision and values and establish your personal, professional, and financial objectives. Additionally, we collect data about your supporting resources, current advisors and better understand the financial decisions you have already made.

DESIGN: We run the analytics and multiple case-scenarios to determine whether your objectives are aligned with your current resources. After analyzing strengths, weaknesses, opportunities and potential threats within each of your priorities, we offer detailed recommendations about how to minimize risks and capitalize on opportunities.

DELIVER: The end result is a clearly defined set of solutions and specific steps on how to implement them. It encompasses financial independence (retirement preparedness), investment management, tax management, risk management, estate and legacy planning, business succession and deferred compensation, amongst other types of recommendations.

Our Philosophy

Regardless of who invests your money, manages your assets, handles your taxes or gives you legal advice, you need a coordinated guide that illuminates where you are, where you hope to be one day, and how to get and stay there. Consider us the "architect" you hire to develop a blueprint for your financial future.

By choosing to create a financial plan, you will embark on an educational and rewarding experience, one that delivers clarity and accountability for what lies ahead. The plan itself represents an unwavering commitment to sound financial fundamentals necessary to weather turbulent markets, mitigate risk, and strategically plan for your future.