



Our Process

Affinity starts with a **conversation**, where we begin learning about:

- What's important to you.
- Your overall financial situation.
- Your goals.

Next, we **review your current investments and savings**, considering your:

- Time
- Tax
- Risk
- Return
- Liquidity
- Legal & other parameters

We then recommend which account types (IRA, etc.) you should hold. We establish the accounts and assign a purpose (retirement, etc.) for each account.

Next, we **assign each account to one of Affinity's many investment profiles** (moderate, aggressive, etc.) and invest each account accordingly.

Once your accounts are invested, we **track your individual investments using technical analysis** - *statistics useful in determining an investment's likely direction.*

When significant changes occur in these statistics (~~indicators~~) we **adjust your accounts automatically.**

Affinity encourages clients to **maintain focus on the big picture**, which includes:

- Cashflow
- Taxation
- Charitable giving
- Insurance
- Retirement
- Education funding
- Legacy (your estate)
- Business
- Other

We offer clients **technology and periodic reviews**, recognizing that doing so helps us better manage your investment accounts and identify areas of your financial life that need further attention.

Affinity provides all these additional financial services free of charge.