



Our Process

- we start with a **conversation**, in which, we begin learning about
 - what's important to you
 - your overall financial situation
 - your goals

next
- we **review your current investment and savings accounts** *and*
 - consider - time • tax • risk • return • liquidity • legal • & other - issues
 - then recommend which account types (IRA, etc.) you should hold
 - then establish the accounts and assign a purpose (retirement, etc.) to each

next
- **each account** is -
 - **assigned to one of our many investment profiles**
 - invested accordingly
- once invested, we -
 - **track your individual investments using technical analysis** -
 - *statistics useful in determining an investment's likely direction*
 - **adjust your accounts automatically**
- Affinity
 - encourages clients to **maintain focus on the big picture**
 - cashflow • taxation • charitable giving • insurance • retirement
 - education funding • legacy (your estate) • business • other
 - offers clients **technology and periodic reviews** in order to maintain this focus
 - we recognize that doing so helps us
 - better manage your investment accounts
 - identify areas of your financial life that need further attention