Good advice is the core of our Financial Planning philosophy.

The Financial Discovery Process

1 INTRODUCTION PHASE

Discussion of the Personal Finance and Wealth Building Process, and overview of the PS&G Model.

Understanding the holistic approach.

2 FINANCIAL VISION PHASE

Assemble financial information and documents.

Discuss financial objectives, wants, and dreams.

Create the "Wish List".

3 PROTECTION INTERNAL DESIGN PHASE

An evaluation of all insurances, legal documents, and ownership arrangements, strategically assessing each piece's role in protecting current and future wealth. More efficient strategies may be recommended in this phase.

4 SAVINGS COMPONENT STRATEGIC DESIGN

An evaluation of the efficiency in each savings element, looking at current and future tax implications, liquidity, and future use strategies (i.e., college and retirement).

More efficient strategies may be recommended in this phase.

5 GROWTH COMPONENT STRATEGIC DESIGN

An evaluation of the efficiency in each growth element, looking at tax implications, levels of risk, diversification, and future use strategies (i.e., college, retirement, and legacy).

More efficient strategies may be recommended in this phase.

6 DEBT AND CASH FLOW STRATEGIC DESIGN

An evaluation of the efficiency of current debt structure, as well as an accounting of current cash flows.

More efficient strategies may be recommended in this phase

7 IMPLEMENTATION AND ON-GOING REVIEW PHASE

We will assist with the implementation of any financial strategies necessary in achieving a more efficient financial model. As the economic landscape in which we live changes, we will conduct regular reviews to assure that the plan remains consistent with whatever changes may occur.

CSC Financial Strategies

define your vision.
realize your goals.

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