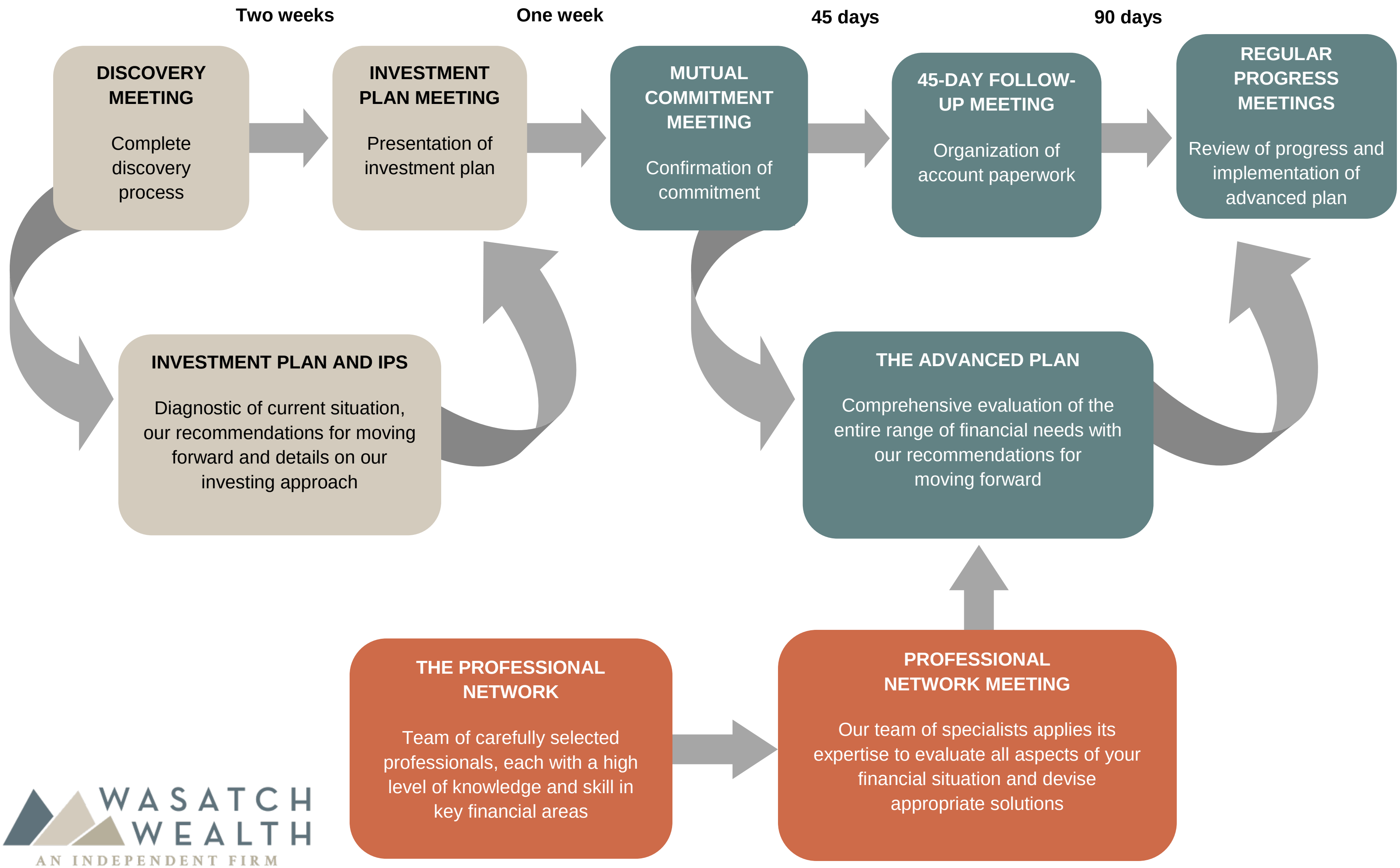
# The Wealth Management Process

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# The Wealth Management Formula

**WM = IC + AP + RM**

**WM (Wealth Management) =**

**IC**
(Investment Consulting)
**+**
**AP**
(Advanced Planning)
**+**
**RM**
(Relationship Management)

**IC = INVESTMENT CONSULTING**

Management of all investment elements to help maximize the probability of clients achieving all that is important to them.

- Portfolio performance analysis
- Risk evaluation
- Asset allocation
- Assessment of impact of costs
- Assessment of impact of taxes
- Investment policy statement

**AP = WE + WT +WP + CG**

**AP (Advanced Planning) =**

**WE**
**(**Wealth Enhancement: tax mitigation and cash-flow planning)
**+**
**WT**
**(**Wealth Transfer: transferring wealth effectively; may not be within a family)
**+**
**WP**
**(**Wealth Protection: risk mitigation, legal structures and transferring risk to insurance company)
**+**
**CG**
(Charitable Giving: maximizing charitable impact)

**RM = CRM + PNRM**

**RM (Relationship Management) =**

**CRM**
(Client Relationship Management)
**+**
**PNRM**
(Professional Network Relationship Management)

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