New to Working with an Advisor?

Learn how our process works

Call to see if we can help

During this call we'll ask some detailed questions to see which advisor is best suited to help you. In preparation of your initial meeting, we will send you the necessary questionnaires to complete prior to coming in.

Meet with an advisor to discuss your goals and concerns

Here, we get to know you and the things you value most. We'll work together to gather data to help gain a better understanding of your current objectives, values, and risk tolerance.

Return in 2-3 weeks for your presentation

Your advisor will present your plan and demonstrate how various choices can impact you by mapping out different scenarios. Our interactive planning software allows us to have a collaborative discussion, change variables in real time, and explore the impact together.

Decide if StrategicPoint is right for you & your family

Sign up to be a client & start executing your plan

Once you decide to move forward with StrategicPoint, our team moves into execution and puts the strategy to work.

Regroup to review your progress

Review the implementation of our investment approach, the rebalancing of your existing plans and any new accounts added. We will also discuss your online access with our two portals and review what you can expect as a StrategicPoint client.

Regular check in meeting, review plan, portfolio, markets

Whether it's your personal life or the economy, things change. All investment strategies evolve over time. At your annual meeting with your advisor, you'll review your plan and make adjustments as changes develop.