The Certus Wealth Management Journey

CERTUS
WEALTH MANAGEMENT

At Certus Wealth Management, we are dedicated to helping individuals reach their financial goals by optimizing the way they manage their resources, invest funds, and plan their estates. We believe transparency is important – here's a step-by-step look into how we support our clients at Certus Wealth Management:

1

Discovery

A discovery meeting with Certus Wealth Management lays the foundation for our partnership. We'll get to know one another, ask questions to learn about your values and priorities, and identify your unique financial objectives. We'll discuss any challenges that you currently face, how you feel about risk, and what you want to accomplish in the future. Through our dialogue, we'll determine if and how strategic planning can improve your financial fitness.

2

Data Gathering

Once we complete the discovery phase, Certus will request certain financial information like investments and tax returns. We'll use this to start building a strategy to help you reach the goals identified in the discovery phase.

3

Financial Planning & Strategy

Using the information you provide, Certus will build personalized strategies designed to help you achieve your objectives. We'll review multiple scenarios and evaluate their outcomes to determine the best approach to get you to your goals. Certus is your resource for any financial questions that you may have, from effectively managing debt to equity compensation and everything in between. We are here to provide the expertise and guidance that enables you to make informed decisions.

4

Plan Implementation

While many well-intentioned plans fail with everything going on in our lives, our team is here to ensure an active focus on executing what we set out to achieve. Once we agree on a plan that best serves your goals, Certus collaborates with you to put the plan into action. This can include opening investment accounts, adjusting current contributions, refinancing debt, or various other tactics designed to meet your needs.

5

Monitoring & Guidance

Certus closely monitors economic, market, and financial developments to ensure we stay current on your financial plan. We conduct semiannual meetings, communicate proactively to keep you informed, and remain available outside of these meetings for any additional questions or concerns you may have.

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CERTIFIED FINANCIAL PLANNER™

To schedule an appointment to discuss your needs, please contact us today.

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