

Suncoast Advisory Group Financial Life Planning Process

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EXPLORE

- Get Acquainted
- Learn about Your Needs, Concerns, and Aspirations
- Provide Information/Describe Process
- Relate Services to Your Issues
- Determine Fit and Establish Relationship

ENGAGE

- Gain Awareness Regarding Your Unique Frame of Reference
- Listen to Your Perspective
- Identify Your True Values
- Clarify Your Priorities

ENVISION

- Guide You in Creating a Vision of Your Ideal Life
- Help You to Define and Prioritize
- Your Personal and Financial Goals
- Establish Guidelines for Developing a Financial Plan that Aligns with Your Values and Priorities

EMPOWER

- Monitor Progress and Help Maintain Focus on Your Personal and Financial Goals
- Review Your Life Goals Periodically to Ensure Your Financial Plan Continues to Support Your Life Vision
- Address New Issues, Transitions, and Concerns

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