Wealth Management Consulting Process

Ortner, O'Brien & Ortner

Two weeks

One week

45 days

90 days

DISCOVERY MEETING

Complete the discovery meeting process

INVESTMENT PLAN MEETING

Presentation of the investment plan

MUTUAL COMMITMENT MEETING

Confirmation of commitment

45-DAY FOLLOW-UP MEETING

Organization of account paperwork

REGULAR PROCESS MEETING

Review of progress and accomplishments of wealth management plan

INVESTMENT PLAN AND IPS

Diagnosis of your current situation. Recommendations for moving forward and details on our investment approach

THE WEALTH MANAGEMENT PLAN

Comprehensive evaluation of the entire range of your financial needs with our recommendations for moving forward

THE WEALTH MANAGEMENT NETWORK

Team of carefully selected experts, each with a high level of knowledge and skill in key financial areas

WEALTH MANAGEMENT NETWORK MEETING

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devise appropriate solutions