THE 5-STEP PROCESS TO

# PROVEN WEALTH STRATEGIES

**Merit Advisors, LLC** advises individuals, families, and businesses on ways to grow their money like the wealthy. Through our five-step process, we will explore the options currently available to you and build a custom wealth plan designed for your unique situation.

## IDENTIFY

1

Discover your needs in life and identify future goals. Explore and discuss uncommon financial strategies that fit your unique situation.

## DESIGN

2

From our findings, my wealth design team and I will craft a customized wealth plan for you and your family entitled, *Your Personal Wealth Report™*; outlining areas for improvements and tax diversification.

## DEVELOP

3

After the detailed presentation, there may be an area where more time will need to be spent based upon your level of understanding.

This step assures your certainty and confidence with the custom wealth plan and allows for any adjustments to be made - if necessary.

## IMPLEMENT

4

Once your confirmation and signature is in place, your plan gets sent to my back office for a thorough review. All medical exams, insurance contracts, redirecting activities, and other necessary steps are completed to set your wealth plan into action.

Delivery is sent with a full summary of benefits and details of your plan.

## REVIEW

5

On your anniversary date (date policy became effective), we will schedule an annual review to go over your plan; making sure you are on pace with the goals we established in prior discussions.

This meeting is also meant to assess your current situation to see if anything has changed. Major life events may change the goal(s) of the plan and adjustments will be made at this time.

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