MAGII WEALTH MANAGEMENT - CONSULTATIVE PROCESS

Two weeks One Week 45 Days 90 Days **DISCOVERY** MUTUAL 45-DAY FOLLOW-**INVESTMENT** REGULAR **MEETING PLAN MEETING** COMMITMENT **UP MEETING PROGRESS MEETING MEETINGS** Presentation of We begin by Commitment of learning about you investment We make certain Review of progress your values, your advisor/client all is in order and management plan. and implementation needs and your relationship. up to date. of wealth goals. management plan THE WEALTH **INVESTMENT PLAN AND IPS MANAGEMENT PLAN** Diagnostic of current situation, our recommendations for moving Comprehensive evaluation of the entire range of financial needs and forward and details on our our recommendations for investing approach. moving forward. WEALTH THE WEALTH **MANAGEMENT MANAGEMENT NETWORK NETWORK MEETING** Team of carefully selected Our team of specialists apply their experts, each with a high level expertise to evaluate all aspects of your of knowledge and skill in areas financial situation and develop critical for the achievement of appropriate solutions. your goals.

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