



WORKING WITH FACET WEALTH

PERSONALIZED, TRANSPARENT, ACHIEVABLE— THE WAY FINANCIAL PLANNING SHOULD BE.

Keeping your financial plan up-to-date is one of the easiest ways to make sure you're ready for whatever life throws at you. In addition to regular check-ins, your CFP® professional at Facet Wealth is here for you anytime you need them. Because when life changes, so should your financial plan.

01 BUILDING A STRONG FOUNDATION

Your dedicated CFP® professional at Facet Wealth will get to know you, your money mindset, learn about your objectives and put your personalized plan to work.

STEP 1: Get Organized

- Review current finances to identify risks and start your planning journey

STEP 2: Share & Define Goals

- Understand your financial, personal, and professional goals
- Address any high priority topics or quick wins
- Set up investment accounts, 401(k)s, etc.

STEP 3: Debt & Investments

- Adjust personal cash flow and budget to help accomplish priorities (e.g. tax withholdings)
- Set up an emergency fund
- Build a customized portfolio for you and your goals

STEP 4: Insurance & Risk

- Once we know where you're headed, we will create customized recommendations for you to get on the path towards achieving your goals

02 EVOLVING YOUR PLAN WITH YOUR LIFE

You'll have check-ins with your planner throughout the year to review market and life changes and ensure your financial plan is on track with your goals. For anything that comes up between your meetings, your planner is just a message away.



FINANCIAL PLANNING FOR EVERY FACET OF YOUR LIFE

From this list and beyond, your CFP professional is just one message away from helping you tackle expected and unexpected events and updating your plan along the way.



FAMILY & LIFE

- Marriage/baby
- Separation/divorce
- Inheritance/death in family
- Buying or renting a home
- And more...



CAREER & WORK

- New job/career change/raise
- Starting a business
- Employee stock plan questions
- Benefits selections
- And more....



RETIREMENT

- Distribution strategies
- Generational transfers
- Charitable giving
- Social security optimization
- Elder care planning
- And more...



INVESTMENT & TAX

- Investment management and optimization
- Retirement accounts
- Market changes
- Tax planning questions
- And more...