Lincoln Financial Advisors®
A member of Lincoln Financial Group

You're In Charge®

Fee-Based Financial Planning Process

Planning for your financial success may seem complicated in today's world. A broad knowledge of everything – from complex investment products to elaborate tax laws – is required.

We can help. With our experience, knowledge and resources, we can help you navigate changing tax laws, volatile financial markets, inflation and evolving personal or business circumstances, and find the solutions toward realizing your financial goals.

Throughout the financial planning process, we never lose sight of one essential element – personal service. At Lincoln Financial Advisors, you'll find the resources of a large company and the personal attention you need to establish a plan toward financial success. When you partner with Lincoln Financial Advisors, you work with a team of professionals in investment and retirement planning, education funding, insurance protection and estate and business succession planning.

Here's a quick look at our six-step financial planning process:

Step 1: Concept Interview

- Discuss our services.
- Discuss your situation.
- Establish fee.
- Secure basic documents.

Step 2: Comprehensive Data Gathering

- Formalize working relationship.
- Gather appropriate financial data, objectives and risk tolerances.
- Discuss and establish goals.
- Discuss attitudes, views and concerns.

Step 3: Financial Plan Design

- Review fact finder and assess status relative to goals, objectives and attitudes.
- Analyze and evaluate current financial status.
- Confirm and clarify data.
- Prepare preliminary financial plan.
- "Try-on" ideas, including key advisors, as needed, and refine recommendations.

Step 4: Formal Financial Plan Presentation

- Present final plan document.
- Answer questions.
- Establish action plan.

Step 5: Implementation

- Coordinate with other advisors.
- Review and recommend specific financial instruments necessary to implement financial plan.
- If desired, assist in implementing your financial plan.
- Secure prestige recommendations.

Step 6: Review & Service

- Analyze ongoing issues.
- Make adjustments as your situation changes.
- Keep financial planning updated/current.

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