DYNAMIC WEALTH SOLUTIONS

The Dynamic Wealth Process

Presented by Dynamic Wealth Solutions LLC, a registered investment advisor.

2024

Introduction to Wealth Management

What is Wealth Management?

Wealth management is a part of financial services that assists you in managing your money, provides you with advisory services and helps you manage financial risk. Wealth management includes comprehensive guidance on finance, taxation, estate and legal.

Why Dynamic Wealth?

Our process is client-focused and personalized based on your needs and investment objectives. Our approach is holistic and we are not stock brokers. We are financial planners that put your best interests first.

Our Process

Holistic Financial Planning Process

1. Gather client information
2. Establish your goals and dreams.
3. Analyze your financial situation.
4. Build a financial plan and present.
5. Implement plan.
6. Monitor, review and update financial plan continously.

Build wealth. Live Better.

Key Facts

- Independent Registered Investment Advisor founded in 2014
- Fee-Only and Fiduciary Wealth Managers
- $64 million client assets under management as of March 2024
- Advisors Brian Smith CRPC®, and Timothy Hooker, AIF® have worked together for 10+ years helping clients build wealth and live better.

Our office in Southfield, MI

Our Partners in Your Success

DYNAMIC WEALTH SOLUTIONS + charles SCHWAB

Who is Charles Schwab?

The Charles Schwab Corporation is an American multinational financial services company. It offers banking, commercial banking, investing and related services including consulting, and wealth management advisory services to both retail and institutional clients. Total client assets as of July 31, 2024 was $9.57 trillion.

Why Charles Schwab?

$0 commissions on online stock and ETFs trades with award winning technology platforms. Schwab continues to earn high ranking in the industry for its heritage of innovation, modern wealth management capabilities, and client service.

MEET THE TEAM

Brian Smith, CRPC®: Private Wealth Manager and Retirement Planning Specialist

- Chartered Retirement Planning Counselor® designation
- License Series 65 Investment Advisor Representative
- Bachelor's Degree in Economics from Michigan State University
- Advisor areas of expertise: generational wealth planning, retirement strategies and estate planning.

CRPC
Chartered Retirement Planning Counselor ®

MEET THE TEAM

Timothy Hooker, AIF®: Private Wealth Manager and Investment Services Specialist

- Accredited Investment Fiduciary® designation
- Series 65 Investment Advisor Representative license
- Bachelor's Degree in Political Science from Wayne State University
- Advisor areas of expertise: retirement strategies, securities analysis, corporate retirement plans, and risk management.

AIF® | Accredited Investment Fiduciary®

MEET THE TEAM

Kiernan Easton: Private Wealth Manager and Investment Analyst Specialist

- Series 65 Investment Advisor Representative license
- Bachelor's Degree in Economics from Michigan State University
- Advisor areas of expertise: retirement strategies, generational wealth planning, and corporate account asset management.

Becoming a Private Client

DYNAMIC WEALTH SOLUTIONS

FIRST INTERVIEW CALL OR MEETING

PRESENTATION

ONBOARDING 100% DIGITAL

BUILD WEALTH. LIVE BETTER.

DynamicWealth.com

Instagram @Dynamic_Wealth

Our Office Address

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