Platinum Wealth Solutions of Ohio

# Our Platinum Advisory Process

## 1 The Personal Insight Meeting

During our initial meeting together, we want to take the time to get to know you and what questions you'd like to have answered.

## 2 The Blueprinting Meeting

During the blueprinting session, we will work with you to identify and select your goals.

## 3 Internal Analysis of Client Options

Before meeting again, our team will work together internally to conduct a thorough analysis of the various options available to you to pursue your goals.

## 4 The Strategy Meeting

During the strategy meeting, we will review your goals and have a collaborative discussion regarding your cash flow strategies.

## 5 The Solutions Meeting

Together, we will review and discuss our team's recommendations for your unique financial plan.

## 6 The Implementation & Statement Reading Meeting

Once we are on the same page regarding your financial plan, we will begin the necessary work to implement the strategies we've outlined.

## 7 The "Standard of Care" Review Meetings

We will regularly monitor your plan's progress and meet to discuss any necessary updates to keep your strategy on track.


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