Our Planning Process

Prospective client indicates interest in BWA

BWA forwards checklist of documents for first interview

First interview (duration of 1 hour):
- Values
- Goals
- Current financial situation (document review)
- Risk Tolerance
- Decision to become a client

Plan review meeting (approx. 60-75 minutes):
- Review of financial planning inputs and assumptions
- Discussion of findings
- List of action items
- Decision to implement

Implementation paperwork (signature ready)

Asset transfer (s)

Ongoing reviews (client dictates frequency)

BLUE WATER ADVISORS
PLANNING SAFE PASSAGE FOR FAMILY WEALTH