IS WILON WEALTH MANAGEMENT THE RIGHT FIRM FOR YOU?

Our goal for this process is to demonstrate, in plain English, how to achieve your financial goals. This starts with never running out of money, paying less in taxes and avoiding icebergs.

There is no charge for this process as we want you to see exactly how we can improve your retirement plan before you agree to paying us a penny. To be honest, we also want a chance to make sure you are a good fit for our firm before we agree to work with you, possibly for the rest of your life.

STEP 1
INITIAL PHONE MEETING

Getting to know one another.

Before committing your time or ours, this 15-minute phone call will give us both a chance to make sure your situation matches our expertise. After all, you wouldn't see a Podiatrist if you needed heart surgery. If we aren't a good fit for each other we will gladly introduce you to a firm who is better suited to your needs.

STEP 2
FIRST MEETING

Prescription without evaluation and diagnosis is malpractice.

The goal of this meeting is to get perfectly clear on your goals, concerns and unique financial situation. Your answers to our questions along with the documents we requested that you bring will guide our analysis.

STEP 3
OUR ANALYSIS

Where the magic happens.

We will apply decades of experience, thousands of hours of training and mentoring by industry experts to answer the following questions:

- When can you afford to retire?
- Are you overpaying your taxes?
- Can your portfolio be improved?

STEP 4
SECOND MEETING

When the proverbial rubber hits the road.

During this meeting we will tell you what you will need to do in order to pursue your financial goals, including the answers to the questions we asked during our analysis. This is where you will see, in dollars and cents, how our firm can improve your finances.

At the end of this meeting we will ask if you would like to begin working with our firm or if you would like to sleep on it.

STEP 5
SLEEP ON IT

Take time to consider our approach.

Having been in business for over 15 years, we are in no rush for you to make a decision. Prior to deciding if we should work together you will want to answer the following questions:

- Do I like/trust/respect the team at Wilon?
- Will the benefits they provide exceed their cost?
- Do I understand and agree with their investment philosophy?
- Do their recommendations make sense to me?

STEP 6
THIRD MEETING

Prepare to hit the ground running.

During this meeting we will answer any questions you have and if you are ready, start the paperwork to become a client.

Prior to this meeting we will have sent you a detailed explanation of this process and answered all of your questions and concerns.

While we would love to work with you, if you decide that it's not a good fit we will wish you all the best and every success. There is never a hard-sell or pressure to say yes.

Advisory services offered through Wilon Wealth Management, a Registered Investment Adviser.