COLONY COMPREHENSIVE WEALTH MANAGEMENT PROCESS

COLONY & YOU

DISCOVERY

Your values and goals drive the process.

We guide you through a discovery interview to gather key information and answer your questions.

Together, we personalize your real-time wealth management portal: **Colony 360**.

2-4 WEEKS

STRATEGY

We develop and present your:
- **Planning Path**
- **Investment Plan**

You test drive the Colony experience and assess the benefits of a potential relationship.

0-2 WEEKS

MUTUAL COMMITMENT

We discuss and confirm our mutual commitment to both each other and the **Planning Path** and **Investment Plan**.

2-4 WEEKS

IMPLEMENTATION

Your team takes action along your **Investment Plan** and your **Planning Path**, including the design of a dynamic **Personal Financial Plan**. We familiarize you with our user-friendly technologies and reports.

2-4 WEEKS

ONGOING PROGRESS REVIEWS

We measure the progress of your **Personal Financial Plan** vs. your **Planning Path**. You know who is doing what, when and why.

Together, we review the status of your **Investment Plan**.

Your values and goals continue to drive the process. Discovery is ongoing.

ONGOING

COLONY & TEAM OF ADVISORS

YOUR TEAM WORKS HARD TO:

- Synthesize and analyze documents and key information gathered during discovery.
- Evaluate your current circumstances, resources and goals.
- Develop customized **Planning Path** setting forth your goals, waypoints and a measurable process for implementing your **Personal Financial Plan** with accountability.
- Design an **Investment Plan** tailored to your risk profile, goals and cash-flow, being mindful of tax and other transition constraints.
- Implement and manage your **Planning Path** and **Investment Plan.**
- Personalize your **Colony 360 Portal** – a secure, live and interactive home for your financial life.

PROFESSIONAL NETWORK

Together, we formalize a team of advisors in key financial areas including tax, legal and risk management.

We coordinate their respective expertise in evaluating your financial circumstances in order to devise and implement value-added strategies.

The Colony Group

WEALTH MANAGEMENT

Investment Consulting

Management of all investment elements to maximize the probability of clients addressing all that is important to them.

- Portfolio performance analysis
- Risk evaluation
- Asset allocation
- Assessment of impact of costs
- Assessment of impact of taxes
- Investment policy statement

Advanced Planning

Wealth Enhancement

tax mitigation and cash-flow planning

+

Wealth Transfer

transferring wealth effectively; may not be within a family

+

Wealth Protection

risk mitigation, legal structures and transferring risk to insurance company

+

Charitable Giving

maximizing charitable impact

Relationship Management

Client Relationship Management

+

Professional Support Network