Wealth Management Associates

FINANCIAL SERVICES

PRIVATE CLIENT SERVICES

We combine talent, experience and information technology to provide leading wealth management and insurance solutions.

- *Wealth Management*
- *Financial Planning*
- *Pre Retirement Planning*
- *Post Retirement Planning*
- *Financial Data Aggregation*
- *Asset Allocation*
- *Education Planning*
- *Insurance Planning*
- *Life Insurance*
- *Special Needs Planning*
- *Estate Planning*
- *Disability Coverage*
- *Investments*
- *Mutual Funds*
- *Money Market*
- *Stocks & Bonds*
- *Municipal Bonds*
- *Managed Accounts*
- *Long-Term Care Coverage*

Let us review your portfolio today!

SIX STEP INVESTMENT PROCESS

INTRODUCTION

The process begins with a comprehensive financial analysis that will define and assess your goals and objectives. We then analyze and provide a Risk/Return Profile and Investment Policy Statement and a customized proposal. Asset Allocation is then discussed along with Portfolio Strategists. Once the strategy is in place, we provide ongoing monitoring and investment rebalancing. Finally we provide consistent reporting.

DISCOVERY

This is where we roll up our sleeves and get to know our clients. Our comprehensive survey and questionnaire allows us to develop a clear picture of your financial position, goals and objectives and tolerance for risk.

SOLUTIONS

Once we understand your financial objectives, we create a Client Proposal and Investment Policy Statement. We then discuss specific, tailored investment solutions developed from your Risk/Reward profile.

IMPLEMENTATON

Our New Account Wizard develops all the new account documents and most of the setup can be done online. Our cutting-edge technology makes the process simple and easy.

45 DAY REVIEW

This is the time to reinforce the plan we have put in place and the intelligence that was utilized. We also provide access to our secure eWeaalthManager website and organize your account statements.

ONGOING MONITORING

Each quarter you will receive a comprehensive Quarterly Performance Review showing you exactly where you stand in relation to your goals and objectives. This is final piece to a superior client experience.

Wealth Management Associates
1976 Gadsden Highway, Trussville, AL 35173
866-319-6500 www.wmafinancial.com