CAPITAL DIRECTIONS
investment advisors

WEALTH MANAGEMENT CONSULTING PROCESS

Two weeks | One week | 45 days | 90 days

DISCOVERY MEETING

Complete discovery process

INVESTMENT PLAN MEETING

Presentation of investment plan

MUTUAL COMMITMENT MEETING

Confirmation of commitment

45-DAY FOLLOW-UP MEETING

Organization of account paperwork

REGULAR PROGRESS MEETINGS

Review of progress and implementation of wealth management plan

INVESTMENT PLAN AND IPS

Diagnostic of current situation, our recommendations for moving forward and details on our investing approach

THE WEALTH MANAGEMENT PLAN

Comprehensive evaluation of the entire range of your financial needs with our recommendations for moving forward

THE WEALTH MANAGEMENT NETWORK

Team of carefully selected experts, each with a high level of knowledge and skill in key financial areas

WEALTH MANAGEMENT NETWORK MEETING

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devise appropriate solutions