THE ARISGARDE ADVANTAGE

EXCLUSIVE PLANNING FOR PHYSICIANS & DENTISTS

ARISGARDE

WIN THE GAME OF LIFE

125 Park Avenue, New York, NY 10017
Tel: 212-389-2741
www.ArisGarde.com

INTRODUCTORY DISCUSSION

An introductory discussion is intended for us to get acquainted and determine if working together makes sense for both of us. If we like each other, share similar philosophies and interests, and just feel like we would work well together we then use the following approach to take you through our comprehensive financial planning process to help you manage your wealth.

Not sure you need the full-blown planning? That's still OK!

There may be something specific to focus on that we can still help you with, and we're happy to do so until you reach the point where engaging with us for a comprehensive plan makes sense.

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INITIAL MEETING

DISCOVERY

This meeting is all about you. The primary purpose of this meeting is to point you in the right direction, or confirm you are already headed that way. It is an opportunity for us to get to know each other and to learn more about your desires, your hopes, dreams & goals for the future.

We will also do a high-level review of your financial situation to learn more about what you are doing, etc. If we agree we would like to work together we will sign a financial planning engagement detailing the work we will be doing for you.

The onboarding process allows us to learn more about your current situation. You may be provided worksheets or lists of data we require as part of the intake process.

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SECOND MEETING

INITIAL FINANCIAL "STRESS TEST" REVIEW

(45-60 MINUTES)

We use this meeting to review your current financial situation, confirming your hopes, dreams & goals for the future as well as the information you input is accurate and complete.

We conduct an initial analysis of your current financial situation to establish a baseline to compare to alternative solutions later, even ones you may have thought of.

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THIRD MEETING

FOLLOW-UP PLAN REVIEW

(45-60 MINUTES)

In this meeting we review the final financial plan solution, highly customized for your situation, that is based upon what you wanted and liked from all the options we previously discussed.

We then review an implementation letter which gives you a road map to make all of this a reality. At this time you are free to implement the solutions by yourself, with another advisor, use us, or some combination of all of them.

FINAL PLAN DESIGN & IMPLEMENTATION

PRESCRIBING TO SOLUTIONS TO MEET YOUR OBJECTIVES

(45-60 MINUTES)

This is a great meeting to test results in advance to see what will work best for you and your money given your unique situation. We compare your current plan to a variety of alternate solutions, going over each one and figuring out which aspects you like and dislike about all of them.

CHECK-UPS

NOT LESS THAN ONCE A YEAR

Now that you have a plan in place it is important to update it on a regular basis.

When?

Life happens and we want to make sure we update and adjust your financial plan as needed, but not less than once per year.

What we have found is that the life of a young doctor is evolving and ever changing- jobs, career paths, big purchases, new position in your practice, family, etc.

Why?

It's far more effective to make small changes along the way to the plan than let time compound any inefficiencies. Plan on meeting with us no less than once a year to review and chat about any changes that may have happened in your life and what this means for your future

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