

Building **YOUR** Strategic Plan

Strategic Financial Group has a 5-step planning process to build a comprehensive, holistic plan designed just for you.

DISCOVERY



During your first visit, our team wants to get to know you and understand your goals and aspirations. In turn, we want to share our investment philosophy and planning process with you.



ANALYSIS

Our team analyzes the information gathered in the Discovery meeting and prepares a plan proposal with specific recommendations based on your current and long-term objectives.

ACTION PLAN



Together, we will customize a comprehensive plan that will help you accomplish your goals and objectives.



IMPLEMENTATION

We will work closely with you to implement the specific strategies recommended in your action plan. Your plan will evolve as your needs change over time.

REVIEW



Our team will schedule regular reviews with you to evaluate your progress and make necessary adjustments.

STRATEGIC
FINANCIAL GROUP

Need a strategic plan for your retirement?

Call **763-241-8197**

Investment Adviser Representative of and advisory services offered through
Royal Fund Management, LLC, a SEC registered investment adviser.