



TEN EYCK FINANCIAL SERVICES GROUP, LLC

The TFSG Client Partnership Process

Five steps to growing your long-term wealth.



1. Introduction

Our introduction process starts by getting to know each other. The goal is to help you feel confident and at ease as we begin this journey together. We recognize that important decisions are made based on your philosophy, family values, goals and wishes. We want to understand this, and how it relates to your unique experiences and circumstances. Equally, we want to share with you who we are, our philosophy and values, and how we can become your trusted partner.

2. Data Gathering and Evaluation

In a safe and secure manner, we'll gather as much data as possible about you. We want to make sure we have an accurate "big picture" of your wants, needs, fears, and dreams. Once data gathering is complete, we evaluate this information to determine whether you are on track to achieve your goals, and if not, how we can make improvements.

3. Development of Recommendations

Based on our in-depth discussions and data analysis, we'll present recommendations that address your goals and risk tolerance. As a team, we will work together to devise your unique plan of action, designed to help accomplish your goals while providing you with financial confidence.

4. Plan Implementation

As your trusted financial partner, we seek to alleviate the stress you may be feeling about managing the complexities of your financial future. We take responsibility for making certain your plan is fully implemented, and will keep you informed of ongoing progress. This will likely include coordinating with other professionals with whom you have a relationship, such as tax advisors and attorneys.

5. Monitoring and Tracking

Your plan's success depends heavily on tracking and monitoring its progress. This ongoing evaluation helps ensure you are heading in the right direction, towards your goals. We will meet periodically to review your progress and make adjustments as needed. We will also address any new life changes that you may encounter along the way, adjusting your plan as needed to incorporate any new outlook on goals, tolerances, or needs.