THE PARR MCKNIGHT DIFFERENCE

THE PARR McKNIGHT WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

Initial Consultation →

CLARITY

GETTING TO KNOW EACH OTHER

- About you
- About us
- Identify how or if we can help

GATHER & ORGANIZE

Gather your essential data, securely organize it, create reports, develop tailored scenarios, analyze plans, and pinpoint strategies and concerns.

Planning Consultation →

CONFIDENCE

PLANNING CONVERSATION

- Review initial plan
- Discuss relevant strategies to implement for tax control, income generation, estate, etc.
- Share insights from investment analysis

REVIEW & REFINE

Refine a draft of your plan, further tailoring it to fit your goals and develop recommendations.

Final Consultation →

STRUCTURE

SHARE RECOMMENDATIONS

- Review comprehensive plan
- Present investment recommendations
- Next actions & **establish regular meetings customized to client needs** →

CLIENT WELCOME EXPERIENCE

Open your accounts, transfer assets, explore online tools, implement strategies, and schedule a 45-day personalized follow-up check-in.

SAMPLE TOPICS

Q1 Planning → **Q2** Tax Strategy → **Q3** Estate Planning → **Q4** Investment → Q1

ADDITIONAL TOPICS:
Education ▪ Executive Compensation ▪ Cyber Security ▪ Philanthropy

ADDITIONAL TOUCH POINTS MAY INCLUDE:
Emails/Newsletters ▪ Webinars ▪ 24 Hour Response ▪ 911/411
Quarterly Thematic Content ▪ Comprehensive Annual Strategy Session ▪ On Demand Consultations ▪ Ongoing Admin & Ops