

Canella Financial Group Investment Process

Charting a course to achieve your DREAM

TARGET DURATION: 1-2 minutes

AUDIENCE: Future and current clients

GOAL: Using the DREAM process, Canella Financial Group will develop a unique plan to achieve their client's individual investment goals.

NARRATION:

Question? Where do you see yourself in five years? What does retirement look like to you? College goals? How does your financial security? Legacy?

At Canella Financial Group, before we begin developing your investment strategy, we take the time to understand your unique situation and goals through our proprietary discovery process – DREAM!

Using the DREAM process, we will...

Discover – We will work closely with you to clarify what is important to you, identify your goals, values, and strengths to help you pursue the future you imagine for yourself.

Research – We will gather financial data, analyze your current financial situation, and quantify your goals based on your priorities. We will utilize our six-step comprehensive financial planning process to evaluate your total situation.

Empower – We will develop a written financial plan that will be presented to you outlining where you currently stand in relation to your future goals. By providing you this information, we can begin to help you move confidently in taking action toward reaching your goals.

Action – We will provide specific solutions and the resources needed to implement your financial plan in order to help meet your unique needs and goals.

Monitor – We will regularly review the progress of your plan toward your goals. Since changes in your situation will undoubtedly arise, we will help you make adjustments as needed to get back on track or to chart a new course.

At Canella Financial Group, our mission is to develop a strategy to achieve your DREAM.

We invite you to contact us today to learn more about how we can help you pursue your DREAM goals.