Financial Check-up

At Sustainable Wealth Advisors we believe that people and the planet are as important as profits. We respect the inherent worth and dignity of our clients and work closely with them to ensure that they don't have to compromise their values to achieve financial security.

-Harry Moran, Sustainable Wealth Advisors

Why do I need a Financial Check-up?

We find that many investors struggle with defining their vision of financial success. Through our financial check-up we evaluate your situation and help you to:

- Gain perspective on your true vision of financial satisfaction
- Build a financial plan based on your own unique goals
- Create a personalized roadmap for your financial future

Engage us in a Financial Check-Up and discover the benefits provided by financial clarity and a forward-looking plan.

Our Process

To examine your financial situation and determine appropriate actions, we will take you through the following steps:

- *Financial Satisfaction Survey*: Developed to help recognize all of the components that contribute to one's sense of financial satisfaction, this tool lays down a solid foundation for the planning and investment management process by connecting core values, concerns and objectives with financial strategies.

- *Capture your Risk Tolerance*: Complete a 5-minute, online questionnaire to pinpoint your ability to withstand downside fluctuation and help guide our decision-making process.

- *ESG Values Discovery*: This unique and powerful tool will identify your preferences and priorities with respect to environmental, social and governance issues by asking a brief series of "real world" questions.

- *Align your Portfolio*: After pinpointing your Risk, we will review your current portfolio and, if necessary, make suggestions to adjust your asset allocation so that it better aligns with your personal risk and impact preferences, priorities and risk tolerance.

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- *Map your Retirement Goals*: We will create a Retirement Map to chart your progress toward your goals.

- *Map your Education Goals* - Identify your family's college funding goals and see whether you're on track to achieve them. This is an optional, add-on service with an additional fee.

When we are finished, we're confident that you'll have a clear understanding of specific steps you can take to increase the probability of success in your financial future.

Contact Us

From our initial discovery meeting and ongoing reviews, we will help you to identify strategies needed to maximize success in meeting your long-term financial goals:

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