FINANCIAL PLANNING
A PERSONALIZED STRATEGY FOR YOUR WEALTH JOURNEY

AAFMAA
COMPASSION • TRUST • PROTECTION

AAFMAA Wealth Management & Trust LLC

Your values, intent, and guidance are the foundation of our Financial Planning services. Attain your goals, minimize taxes, make informed financial decisions, realize your dream retirement, and **achieve financial peace of mind.**

1
Establish the Relationship

You'll receive an explanation of our financial planning services and learn each party's responsibilities. You'll discover how long the professional relationship will last, the cost, and what to expect.

2
Gather Data and Develop Your Financial Goals

We discuss your current financial situation and collect necessary documents. Together, we define your personal and financial goals, including time frames.

3
Analyze Your Current Situation

Your assets, liabilities, cash flow, current insurance coverage, investments, and estate plans will be analyzed. Your Financial Planner considers all aspects of your situation to determine what you need to meet your goals.

4
Develop Alternative Courses of Action

After reviewing your current financial situation, you'll be presented with recommended changes to help meet your goals. Multiple meetings take place to review the path to achieving your personal goals, prepare for bumps in the road, and establish alternatives.

5
Execute the Plan

Execute the Plan. Your customized financial plan will provide clarity on how to achieve your goals, focus on the immediate objectives, and stay on course for the long run.

6
Review Progress

Benchmark your progress against your financial plan. It is important to monitor your financial plan and ensure you're staying on track. Life changes, and so will your plan.

You're in charge. We're your staff. Our mission is to help you execute and achieve your goals. **Start today to make smart financial decisions for the rest of your life.**

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