Second Opinion Service

Many people are dealing with complicated financial situations.

A PERSONALIZED APPROACH: **We listen carefully to what matters the most to you**

We approach each new prospective client relationship with a comprehensive and collaborative process. A truly thorough wealth management discussion goes well beyond investing. It is the effective collaboration of a team of professionals: investment consulting, legal, tax, insurance and lending. Our goal is to create an open dialogue in which we can learn about your unique family goals and develop a strategy that can help maximize the probability of getting you where you want to go.

HERE'S WHAT WE OFFER: **A 360 degree review of your current financial situation**

Our Second Opinion Service is a means of affording you access to the initial stages of our consulting process at no charge.

1. Our promise: Determine what you want your financial future to look like

2. Our process: Identify any gaps in your current financial plan

3. Your roadmap: Develop a sound strategy to help you achieve your most important goals

STEP 1
Comprehensive Discovery Meeting

STEP 2
Gap Analysis and Wealth Management Plan Creation

STEP 3
Wealth Management Plan Review Meeting

Greg LeClair, CIMA®

Executive Director, Financial Advisor

Greg has worked with small business owners, non-profit organizations, and affluent families for over 30 years, helping them make smart decisions about their money. He uses a well-defined wealth management and behavioral consulting process with two broad mandates: 1) striving to free up clients' time to allow them to focus on their areas of interest and passion while knowing that their financial house is in good order, and 2) to help maximize the long-term value of assets for the benefit of the people and causes that are most important to them.

To schedule your Second Opinion Appointment, please contact Greg LeClair at

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