ANDERSEN
WEALTH MANAGEMENT
PROACTIVE • SENSIBLE • PERSONAL

ANDERSEN WEALTH MANAGEMENT FINANCIAL COMPASS

Let the AWM Financial Compass lead you in the right direction

STEP 1: INITIAL PHONE CONFERENCE

- Conference call with Michael Andersen (10-15 minutes)
- Discuss general background information
- Address questions
- Overview of AWM process

STEP 2: EXPLORATION MEETING

- Face-to-face meeting with financial team (1-2 hours)
- Gather information for planning process
- Go over questionnaire
- Review financial account statements

STEP 3: PROPOSAL MEETING

- Presentation of custom AWM Retirement Roadmap
- Address questions and concerns
- Reposition assets so AWM can begin to work with/for you as part of our fiduciary process.

STEP 4: IMPLEMENTATION MEETING

- Review goals and concerns
- Implement plan!

STEP 5: ONGOING CHECKPOINTS

- Regular check-in calls from AWM staff every 90 days
- Regular reviews with a member of financial team

6 West Dover Street | Easton, MD 21601
Phone: 410.690.4894 Fax: 410.690.4892
Email: info@andersenwm.com