

EVOLUTION OF FINANCIAL PLANNING



Comprehensive financial planning is meant to eliminate confusion by identifying how assets and goals complement each other during the different stages of life. However, large financial plans may leave a person overwhelmed, potentially leading to a greater risk that key parts of the plan will remain unimplemented. Although the accuracy and thoroughness of a financial plan is important, prioritizing a plan into manageable steps can be just as valuable. The stages detailed below offer some examples of how to navigate a comprehensive financial plan from setting a foundation to transferring assets to the next generation.

