Beata Dragovics
Second Opinion Experience

Exclusively for the friends, family and colleagues of our valued clients and associates

In this changeable economic climate, you probably have a friend, family member, or colleague who is looking for greater clarity and more insight regarding their financial and investment goals. As is often the case with important life considerations, most people would value a second opinion.

In order to help the people you care about achieve their financial goals, we have created our Second Opinion Experience exclusively for the family, friends and colleagues of our clients and associates.

Comprehensive Client Experience

We have a clear and comprehensive vision of wealth management, therefore we deliver strategies and solutions that are customized to align with each client's personal values, fulfills their current needs, and empowers the confident pursuit of their goals.

Investment Consulting	Financial Planning	Client Relationship
• Asset allocation • Portfolio management • Risk evaluation • Performance analysis	• Wealth building • Education Planning • Retirement Planning • Equity Compensation Strategies • Small Business Planning	• Regularly scheduled calls, reviews and meetings • Access to legal, tax, and insurance experts • Ongoing relationship with the FTF team

Collaborative Approach

We value the genuine relationships we have with our clients and understand that their participation is vital to the effective and ongoing implementation of their wealth management objectives.

Full Client Experience

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Discovery Meeting	Wealth Management Planning Meeting	Mutual Commitment Meeting	Strategy Implementation Meeting	Progress Meetings & Relationship Building

What to Expect from the Second Opinion Experience

We will meet with your friends, family members and colleagues for Discovery Meeting then invite them back for a Wealth Management Planning Meeting- hopefully, we can confirm that they are on target to fulfill their personal values and goals, or if needed, we can suggest ways we can help, including a referral to another financial advisor who may be better suited for their needs. In either case, they will receive a personalized financial analysis of their current situation.

Second Opinion Experience

Stage 1	Stage 2
Discovery Meeting	Wealth Management Planning Meeting

It would be our pleasure to help those you care about!

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