The Pintler Approach to you First Financial Meeting

C0257 Hi, my name is Cam Humphrey financial advisor with Pintler Wealth Management Group.

C0259 As one of the Financial Advisors here at Pintler Wealth Management Group, I understand meeting a financial advisor for the first time can be confusing when you don't know how to prepare or what to expect.

C0261 For that reason, I wanted to break down how Pintler makes your initial meeting an approachable and simple experience.

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C0262 We frame the initial meeting as an opportunity for us to get to know one another.

C0263 It is an open dialogue free from any pressures or expectations. Our focus is to answer three simple questions. First, we ask "What are your financial goals?"

Whether it's saving for a house, funding a child's college education, taking your business to the next level, or crafting the perfect retirement plan, this step helps Pintler tailor our services to your exact needs.

C0265 Second, we ask "How can we add value to your financial picture?"

C02066 From lending our expertise to grow your current investments, to detailed retirement planning, and even coordinating with your CPA and Attorney for efficient tax planning and a strong estate plan, we'll discuss the ways Pintler can connect all the dots for a holistic look at your financial picture.

C0269 Finally, we ask, "What does working together look like?"

C0272 This is where we dive a little deeper into your understanding of and background in wealth management. We'll explore topics such as the management process, communication frequency, investment philosophy, fees and how they apply to your financial success.

C0273 By exploring these 3 questions, Pintler gets to know you on a deeper level to identify your specific financial goals before pairing our services with your needs.

C0275 From your investment objectives to your current portfolio, to even your past experiences working with financial advisors, we want to know what is on your mind financially.

C0276 As we wrap up, our focus is on answering your questions to ensure that Pintler Wealth Management Group is a good fit for both you and your family.

C0277 All in all, Pintler Wealth Management Group understands meeting with an investment planner for the first time can make anyone feel a little anxious Our promise is that the initial meeting will be a simple conversation about where you are on the financial journey – and how our knowledge and resources can assist you.

C0278 Stop by our website or get in touch by phone and begin your journey today!