WealthTrust Advisors
POWERED BY HIGHTOWER

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Second Opinion Service

A complimentary analysis to help strengthen and validate your financial strategy.

At our practice, we understand that making sure your financial strategy aligns with your life and goals is crucial – but this can be confusing. With so many wealth managers, investment options, and service models out there, it can be challenging to know whether you're receiving the support you need. Sometimes, all it takes is simple reflection and a fresh set of eyes to get a clearer perspective.

REFLECTING ON YOUR CURRENT FINANCIAL STRATEGY

- [ ] Does your financial plan address your entire financial picture—not just your investments?
- [ ] Is your financial plan regularly updated to reflect changes in your goals or life circumstances?
- [ ] Are your other teams of professionals—like accountants or attorneys—collaboratively involved?
- [ ] Do you know your risk tolerance and do your investments align with it?
- [ ] Are you aware of the fees you're paying and their impact on your financial outcomes?
- [ ] Do you feel that your financial conversations are clear and easy to understand?
- [ ] Is your estate plan current and aligned with your wishes, investments, and financial plan?
- [ ] Does your financial strategy involve and support your family's understanding and goals?
- [ ] Are you experiencing the level of financial security and confidence you want?

If any of these questions give you pause, our Second Opinion Service can offer you new clarity, validation, or direction around your financial strategy.

WHAT'S INVOLVED IN OUR SECOND OPINION SERVICE?

01 **Initial Consultation.** We invite you to have a simple, 30-minute no-pressure conversation (virtually or in our office) where you can share your story, goals, and any areas of concern. Feel free to bring a family member or trusted friend for support. This step is designed to be convenient and comfortable. We'll follow your lead.

02 **Document Review.** To help ensure we provide you with a comprehensive assessment, we may ask you to share a few key documents, such as your most recent financial statements, plans or summaries; investment portfolio details; or estate planning documents. We'll guide you through this step and make the process secure and understandable.

03 **Personalized Feedback and Next Steps.** We'll provide personalized feedback about how your current financial strategy aligns with your intentions. We may highlight services or changes that could be integrated to help you better achieve your goals. No matter what, you'll receive clear, high-level recommendations for next steps.

04 **Collaboration and Implementation.** Whether your current strategy's strength is confirmed or enhancements are suggested, you'll gain insights that empower you to make informed decisions. If we do make recommendations and you choose to become our client and act upon them, we'll work collaboratively with your existing professionals to update your financial strategy accordingly. Our team also handles the transfer process.

The service is simple and transparent, takes little of your time, and requires no commitment. You gain confidence that your financial strategy is well-suited to your goals and evolving needs. Our team handles the heavy lifting, making the process smooth and straightforward.

Reach out to us today to schedule your complimentary consultation. It's easy, insightful, and could be the key to realizing more of your financial potential.