APOGEE
WEALTH MANAGEMENT

Apogee Wealth Management
21800 Haggerty Rd, Suite 102
Northville, MI 48167

Wealth Management Consultative Process

CLIENT EXPERIENCE

TWO WEEKS

Discovery Meeting

Complete Discovery Process

TWO WEEKS

Financial Plan Introduction

Presentation of Initial Plan

45 DAYS

Mutual Commitment Meeting

Confirmation Of Commitment

90-180 DAYS

Account Integration Meeting

Organization of Accounts

90-180 DAYS

Regular Progress Meetings

Review of progress & Implementation of advanced plan

SUPPORTING THE CLIENT EXPERIENCE

Investment Plan & IPS

Diagnostic of current situation, our recommendations for moving forward and details on our investing approach

The Wealth Management Plan

Comprehensive evaluation of the entire range of financial needs with our recommendations for moving forward

The Wealth Management Network

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial areas

The Wealth Management Network Meeting

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devise appropriate solutions

Apogee Wealth Management *is a registered investment adviser. Information presented is for educational purposes only and does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies. Investments involve risk and, unless otherwise stated, are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy discussed herein. Past performance is not indicative of future performance.*