

ALEX RAMOS



CONTACT



000-2133-444-456



aramos@abcfinancial.com



abcfinancial.com



ABC Financial
1234 Main Street South
Anytown ON L0L 2A2



CLIENT SERVICES

- Qualified, Helpful Staff
- Privacy & Confidentiality
- Transparent Reporting

THE VALUE OF PROFESSIONAL ADVICE

ALEX RAMOS, CFP

"Using a holistic approach, my focus is to understand you, your family, your objectives, and act as your advisor, partner, and facilitator to help keep you on track. As a Certified Financial Planner, I am privileged to provide clients with a comprehensive, personal financial plan that incorporates these six steps." **Alex Ramos**



WORKING TOGETHER

Determine the scope of how we will work together. Establish details about responsibilities, time frames, and compensation.



IDENTIFYING GOALS & OBJECTIVES

Clarifying goals and objectives will help determine the best financial planning strategy for you.



ANALYZE THE SITUATION

Analyzing all your relevant financial data will help identify areas that create barriers to achieving your financial objectives.



RECOMMENDATIONS

A strategy with clear, written recommendations will be structured to meet your needs without emphasis on products.



IMPLEMENTING STRATEGIES

Implementing your strategy with agreed actions, responsibilities and time frames will help you reach your desired goals.



MONITOR AND REVIEW

Regular reviews will help you remain on track and will provide opportunities to make changes as your life changes.



ABC FINANCIAL
WEALTH BUILDING CANADA