

## Helping You Get From Today to Some Day

Our advisory process starts with where you are today—both personally and financially—and where you want to go. Then we build a comprehensive, long-term plan to get you there. And help you stay on track to make your “*some day*” a reality.



### 01 Understand Your Goals

To build your plan we first need to understand what is most important to you— your values, priorities, concerns and hopes. We want to understand where you are today and where you want to be in the future.



### 02 Create Your Plan

Once we understand what matters most to you personally and financially, we work together to put together the best possible long-term plan to get you there. Your plan will focus on a wide variety of areas and draw on Apella’s wide-range of expertise



### 03 Develop Your Portfolio

A key part of most plans is your portfolio, which will help fund many of your goals. We use an Evidence-Based approach, grounded in data and academic research, designed to give you confidence in achieving your goals with a suitable amount of risk...



### 04 Ongoing Advice & Monitoring

We regularly evaluate your plan to make sure you stay on track toward achieving your goals. We will also update as needed to reflect changes in your life or needs or circumstances. And we will provide you with ongoing advice and education so you always know where you stand

## The Apella Commitment

All of us at Apella are invested in your goals. We are committed to delivering a better experience for our clients and their families today and for many years to come.