

WWM EMERGING MILLIONAIRE METHOD™

Three Simple Steps to Securing Your Financial Future



Introduction & Discovery Meeting

Will start by assessing a mutual fit and learn more about you. This will give us both a chance to make sure we can deliver value to you.

If you decide to move the conversation forward, we will meet to discuss your goals and review your financial situation. This is your opportunity to determine how you want to work with us.



Getting Organized & Brainstorming

The financial planning process begins with helping you sort through your financial lives and getting that information organized using our financial planning software, eMoney.

We will then evaluate your current financial status together, helping you determine what needs to happen to achieve your goals.



Plan Delivery & Implementation

We will formally deliver your initial financial plan. Our goal is to help you implement the top 1 or 2 recommendations right away.

Over the course of our relationship, we will repeat this process.