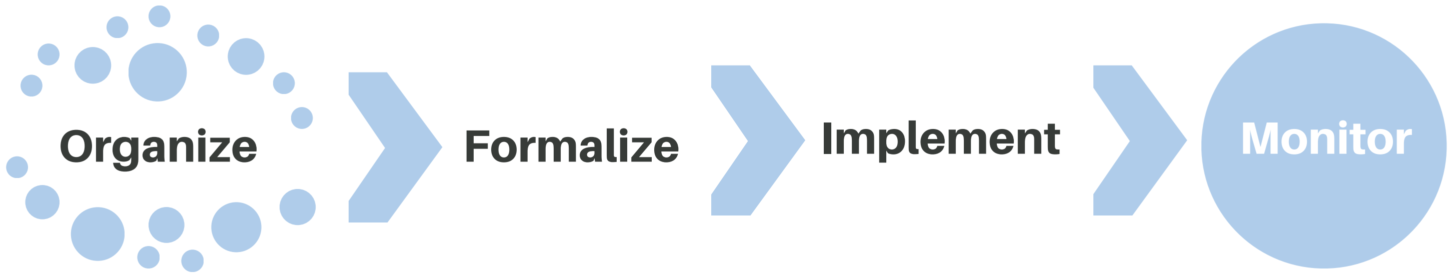
The RFG Process

RFG follows a set of fiduciary standards and prudent practices putting together a financial plan when working with our clients.

A Look into our Financial Planning Process:



Organize

You will be provided an Initial Meeting Checklist of items necessary for an efficient first meeting. After learning more about you, your needs, goals, etc., we will be ready to formalize a plan as the next step in our process

Formalize

Our team will put together a comprehensive financial plan and customizable strategy based on your objectives, time horizon, risk tolerance, tax status and more. You will then be provided with a thorough summary of our needs analysis with a set of recommended appropriate solutions to consider

Implement

Once we have determined the best path forward based on your current financial situation and proposed plan, we will provide the appropriate guidance on next steps and necessary documents required to enact your plan

Monitor

RFG performs comprehensive, proactive, quarterly reviews covering the full breadth of your financial plan throughout the year. This review follows fiduciary standards and utilizes the expertise of each member of your RFG Service Team