Hudson™
FINANCIAL SERVICES

Financial Solutions For A Changing World

Financial Planning Roadmap

Hudson Financial Services is committed to understanding your financial circumstances. We create a customized investment strategy to help you pursue your desired objectives. Throughout this process, we work closely with you to keep you informed and in control of your investment portfolio. By helping you allocate your investable assets, monitoring the progress of your portfolio, and communicating with you regularly, our aim is to ensure that you fully understand the progress of your portfolio toward meeting your goals. Our dedicated staff will be with you every step of the way on your retirement planning journey.

1. Introduction

We will review obstacles and uncertainties facing investors today and explain the importance of utilizing a disciplined investment approach. We will also introduce our investment process and our wealth management team.

2. Discovery

During this meeting we will work with you to complete our Discovery Workbook, which allows us to develop an in-depth picture of your financial position, your goals and objectives, and your tolerance for risk. Our goal here is to address and prioritize all of your financial needs.

3. Recommended Financial Strategies

Once we clearly understand your financial objectives and have established your Risk/Return profile, we can develop and present a customized investment strategy tailored to your current financial situation. We offer customized investment strategies based on your personal goals, needs, and objectives. These strategies are designed to show you how to get where you want to go.

4. Implementation

At this meeting we will answer any questions you may have about our approach and recommended investment strategy. Should you choose to work with us, we will have you sign all of the necessary documents to establish and fund your investment account.

5. 45-Day Review

After we have established your investment account, we will meet again to discuss your investment strategy, review the materials you will receive, and answer any of your questions or concerns.

6. Ongoing Progress Monitoring

Each quarter we'll deliver a comprehensive Quarterly Performance Review, showing you exactly where you stand in relation to your goals and objectives. We will review your long term strategy and goals, and if your financial circumstances change we will be ready to suggest changes to your investment strategy.

As your Financial Advisors, we believe that maintaining regular contact is essential to keeping you well informed about your investments. We are always available to meet with you individually, and we provide an ongoing communication program that offers you far more than a monthly statement. Not only do you get constant access to account information, but you receive clear, concise, and timely reporting of everything you want to know about your accounts and the investment markets. At Hudson Financial Services, we are dedicated to providing a "concierge" level of service to all of our clients.

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