Live Oak Wealth Management's Client Experience

LIVE OAK WEALTH MANAGEMENT

Live Oak Wealth Management has a clear process to understand your goals and develop a plan objectively.

1. Discovery Process
Identify your goals, values, fears, special concerns/challenges, family situations

2. Develop investment strategy
- Determine risk tolerance
- Analyze current Investment portfolio
- Develop asset allocation strategy
- Review current liabilities

3. Investment strategy meeting
In-person meeting to present recommended investment strategy

4. Implementation mean
- Open new accounts
- Transfer existing assets
- Conduct trades to execute agreed-upon investment strategy
- Develop communicate schedule

5. 45-day follow-up meeting
In-person meeting to discuss
- First statements
- Organization of paperwork
- Set up online account access (and review online resources)

6. Develop comprehensive wealth management plan
- Comprehensive financial planning
- Retirement planning
- Credit and lending
- Insurance and liability management
- Educational planning
- Business succession plan
- Charitable giving
- Family dynamics
- Estate planning

7. Wealth Management Plan meeting
In-person meeting to present comprehensive wealth management solutions

9. Execute wealth Management plan
Ongoing execution of wealth management solutions

9. Ongoing evaluation of investment strategy and wealth management plan
Develop schedule for review meetings

5 Days → 10 Days → 20 Days → 30 Days → 65 Days → 90 Days → Ongoing