LodeStar
Advisory Group, LLC

The LodeStar Experience®

"Winging It" Is No Way To Plan For Your Future

You should be receiving total financial planning advice, not just investment advice. We'll help you organize your financial life. Financial organization is the cornerstone of a healthy financial life. It sets the stage for smarter financial decisions. **Here's what you can expect when you contact us about becoming a wealth management client:**

- We initially speak with most potential clients by phone, so that we can help you assess whether LodeStar® would be a good fit for you and your family. During the initial phone consultation, we'll ask you to share basic information about your financial situation and your goals.

- The next step would be to set up a personal appointment, either at our office in Naples or at a place that is convenient for you (as geography allows). At this meeting, we'll get to know each other better – much better. We'll ask a series of deeper discovery questions, and get clarity with respect to where you are now and where you'd like to be in the future.

- If we all agree that the relationship should move forward, we'll schedule another meeting in our office or virtually, and we'll prepare all documents required by our custodian, Fidelity Investments Inc., to establish you as a client of LodeStar®. As a client, you will have convenient online access to all of your investment account information. We'll also provide you with several financial planning worksheets to complete.

- George Kiraly CFP® will work with you to help you discover Your Personal Risk Number via our award-winning, risk-engineering technology, which will be the guiding metric in the design of your investment portfolio. He will oversee your investments and work with you to develop a dynamic and comprehensive financial plan. Simultaneously, Sara Solano, our Client Experience Manager, will reach out to you to get you set up on our award-winning financial planning platform – MyWealthPlan, the most powerful financial planning software in the industry. George will work closely with you to get your complete financial life in order. Our tight-knit, integrated, holistic planning approach will give you the highest probability of achieving the outcome you are looking for – an organized, worry-free, financial life.

- You can expect to hear from George and Sara often. Our communication program is one of the pillars of our Wealth Management program. We will be in constant communication with you. We'll help you focus on your desired outcomes throughout our relationship.

Our wealth management services are designed to put a sound, personalized plan into place for you efficiently and effectively, so you can get on with what's most important to you – enjoying your life!