THORIUM
WEALTH MANAGEMENT

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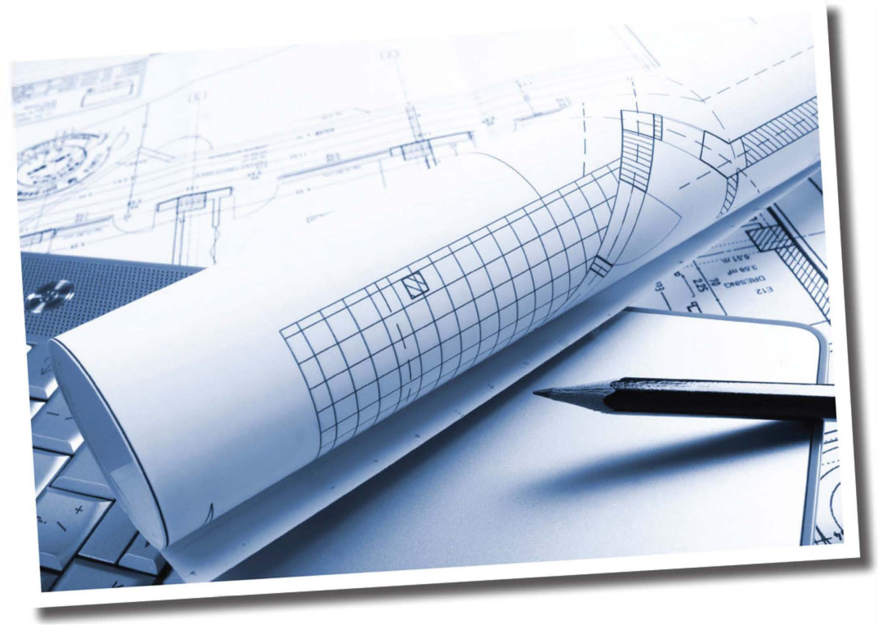
Thorium Wealth Architect



Let’s build your financial future together

Thorium Wealth Architect
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The path towards your financial future requires a clear vision, a detailed plan, and a dynamic team. Taking every factor of this important process into account, we construct powerful blueprints designed with he goal of building and retaining wealth. Our innovative approach includes estate planning, investment strategies, and business succession planning.

Phase One

The Foundation Dialogue

The process starts with a meeting to capture your personal and financial goals and identify obstacles and opportunities. We clarify and document how you measure success, how we will work together, and help ensure we build a Strategic Blueprint that is appropriate for your core personal and financial needs.

Phase Two

The Strategic Blueprint

Once your goals have been established and financial documents collected, we will present an overview of our financial assessment. The Strategic Blueprint outlines the financial focus areas we will address and how we will manage specific deliverables and timelines.

Phase Three

The Goals Navigator

We work together regarding your unique personal and financial goals. We discuss your vision for the future, your current situation, and how we work towards achieving that vision through four focus areas including:
Estate, Investment, Financial Independence, and Business Exit Planning.

Phase Four

The Solutions Activator

Having completed the focused planning components, we move into the implementation phase of your Strategic Blueprint. Collaborating with your tax and legal advisors as needed, we deploy the wealth solutions in a timely and efficient manner.

Phase Five

The Custom Wealth Inspection

We meet regularly to reflect, review, and discuss your plans. To best serve you and your family, The Custom Wealth Architect ™ provides dynamic, relevant financial strategies that evolve with your changing needs and goals.

- Annual schedule of events
- Regular reviews of all financial vehicles
- Legacy Plan review
- Vaulting of important documents
- Tax reduction review and strategy alignment

The Estate Plan Focus
Assessment of your wills and trusts, life insurance policies, disability income and long term care insurances. All are reviewed and measured against your survivor needs and distribution objectives.

The Personal and Business Investment Focus
Evaluation of your personal risk tolerance, time horizons, current risk exposure and portfolio construction. Alignment of your investments with goals, values and time horizons.

The Financial Independence Focus
Review of your financial vision and values to determine your financial independence threshold.

The Business Exit Planning Focus
We look at your business as a key financial asset and evaluate various exit strategies, deferred compensation strategies, and tax advantaged strategies tailored to your business.