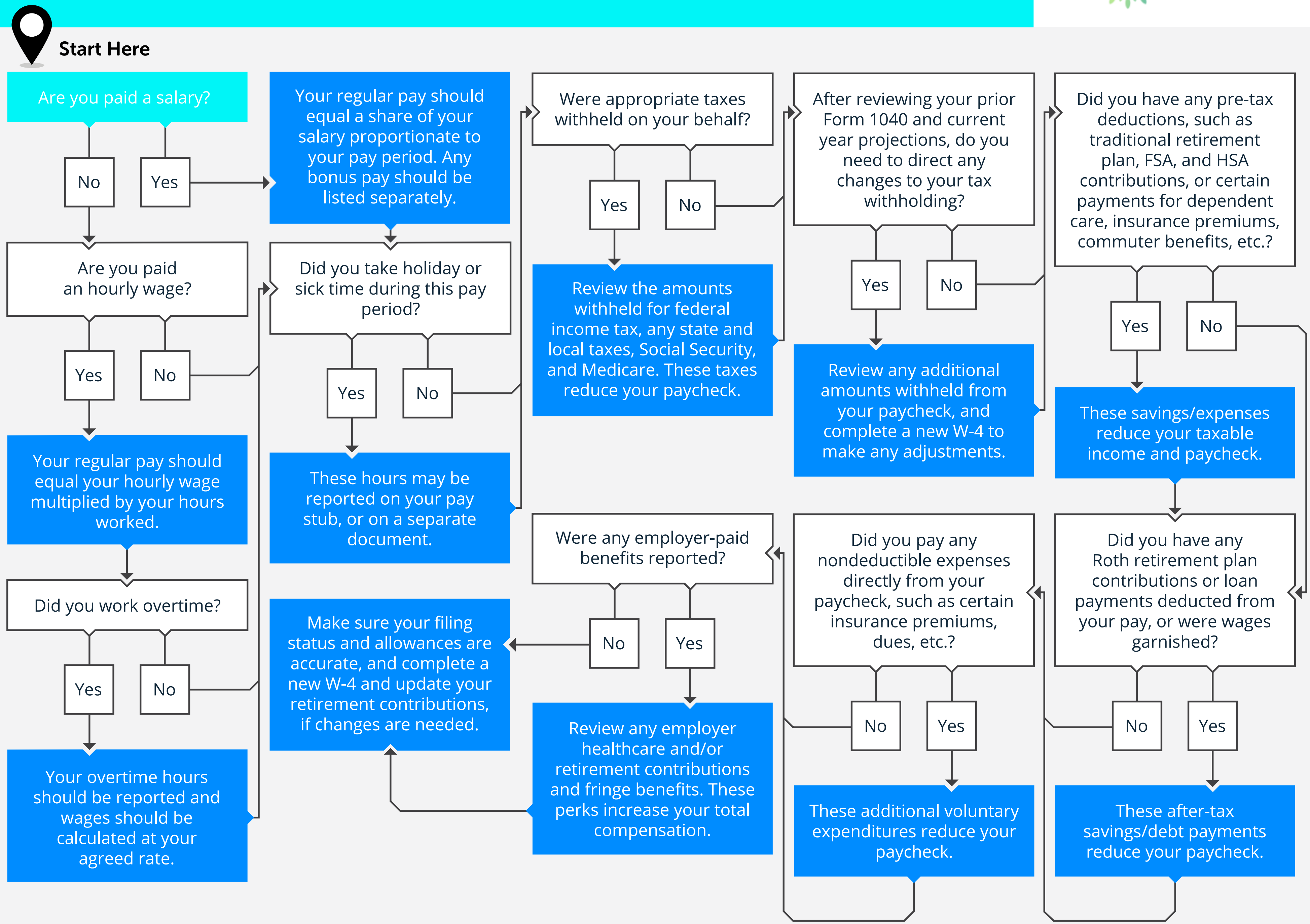
2022 · PAY STUB REVIEW

THRIVE WEALTH STRATEGIES



Our Process

1 Give Us a Call

We'll start things off by scheduling some time to talk over the phone. This will give us a chance to learn more about your concerns and answer your questions. By the end of the call, we should both have a good feeling if we are a good fit to work together.

2 Get Organized

We'll gather your financial details. This step involves gathering everything in one place. And don't worry. At this stage, we'll also empower you to set up a system to keep your finances organized in the future.

3 Get Started

We'll match this information with your financial goals to create an in-depth analysis. This will include a customized financial planning checklist as well as an Investment Policy Statement. When you are comfortable moving forward, we can work together to put your plan into action.

4 Track & Adjust

Moving forward, we'll continuously monitor your investment performance and reevaluate and readjust your financial plan as needed to stay on track with your evolving needs and goals.

Scott Nelson, Financial Consultant
346 Commercial Street Boston, MA 02109
scott.nelson@lpl.com | 8606801708 | thrivewealthstrategies.com