

# Your Journey With MA Private Wealth



## A 5-Step Approach to Managing Your Wealth

1



### Discovery Meeting

Your advisor takes the time to really listen. We ask about your goals, your situation, and what you're hoping to accomplish, and we start thinking through what a strategy might look like for you.

2



### Onboarding

Our service team guides you through every step of getting started. You'll securely share your current financial information, and we'll map out a clear path for moving your assets over.

3



### Your Strategy Takes Shape

Your advisor builds your investment strategy and financial plan together as one approach, not two separate conversations. We'll walk you through what we're recommending and why, and make sure everything reflects your goals.

4



### Implementation

We put the strategy in motion. Your advisor stays closely involved as your investment portfolio is set up and your planning continues to develop.

5



### Ongoing Guidance

Your advisor stays in regular contact, checking in proactively as your life and the markets change. You'll always know where things stand and have a team you can reach when questions come up.



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**To discuss your needs,  
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