

VICTORIA ROBERTS FINANCIAL PLANNING PROCESS

FINANCIAL CLARITY PROCESS

Our Financial Clarity Process is based on our strength and ability to provide each of our clients with creative insight and intelligent information. The result is practical solutions that exemplify thoughtful care and guidance based on your goals and our expertise.



VALUES & GOALS DISCOVERY

Our process begins with a 'get to know you' meeting focused on aligning your values, priorities and personal motivations, with your resources, to create a personalized financial plan that meets your short and long-term goals.

LIFE & WEALTH PERSPECTIVE

We pride ourselves on our ability to clearly interpret the relevant implications of seemingly complex financial issues as they relate to our clients' lives. We combine this with a holistic approach to create a cohesive plan based on your financial situation, emotional motivations, and other important aspects of your life.

STRATEGIES & SOLUTIONS

Once we have a clear picture of who you are and what you want, we can create the strategies and solutions to meet your needs. Our on-going monitoring ensures that we keep your portfolio current and protected.

FINANCIAL CLARITY DECLARATION

Our financial clarity declaration summarizes your values and strategies that will help you achieve your goals. For example, "I want to live my life on purpose, knowing my most meaningful values and goals are not only achievable but protected."

MANAGING GOALS & LIFE CHANGES

We provide ongoing monitoring of implemented solutions to ensure you're on track to reach your goals. We work with you to address any life transitions, as they arise, implementing changes when needed, to ensure that your current plan continues to meet your goals..



Victoria L. Roberts

FINANCIAL CLARITY FOR WOMEN IN TRANSITION