# BENNETT WEALTH STRATEGIES

Advisors with D.A. Davidson & Co. member SIPC

D|A|DAVIDSON

The Strength of Advice®

Stephanie Bennett, CWS® | Senior Vice President, Financial Advisor, Portfolio Manager

## CLIENTS

Our clients are busy, successful individuals and families who require a financial advisor to help them plan for their future, manage their investments, and accomplish their goals while minimizing their exposure to risk.

## PHILOSOPHY

As a Certified Wealth Strategist® professional, I believe in taking an integrated approach to wealth planning and investment management.

1. INTRODUCTORY CONVERSATION
2. DISCOVERY MEETING
3. FINANCIAL PLANNING DISCUSSION
4. FINANCIAL PLAN PRESENTATION
5. PROGRESS REVIEW

## PROCESS

1. We begin with an introductory conversation to determine whether our philosophy and process are a good match for what you need from a financial advisor.
2. Our discovery process enables us to gather sufficient information to understand your goals, current situation and risk tolerance in order to effectively develop and customize your financial plan and recommendations.
3. As our financial planning process proceeds, we examine each of the 13 wealth management issues as they relate to you.
4. After developing your plan, we discuss recommendations, strategies and then decide on our next steps.
5. During our progress reviews, we talk over any updates to your financial plan and portfolio, as well as record progress toward your goals.

## THE 13 WEALTH MANAGEMENT ISSUES

**We help our clients address these 13 Key Planning issues:**

- *Retirement Planning*
- *Investment Planning*
- *Tax Planning*
- *Risk Management & Insurance*
- *Titling & Beneficiary Designations*
- *Executor & Trustee Selection*
- *Planning for Incapacity*
- *Education & Family Support*
- *Distribution of Estate*
- *Banking & Credit Management*
- *Executive Compensation*
- *Business Succession Planning*
- *Charitable Giving*

## INVESTMENT PHILOSOPHY

Our approach to investing begins with the belief that wealth can be built over time through ownership of quality companies and real estate in areas of high demand.

Once asset allocation and risk parameters are determined, our portfolios typically include a core of dividend-paying stocks and fixed income securities, along with ETFs or mutual funds as appropriate to meet allocation needs.

## SERVICE

We are committed to providing our clients with the very best in prompt, efficient service. Our careful attention to details includes a particular focus on RMD beneficiary designations with a goal toward simplifying estate planning concerns.

## HOW I CAN HELP YOU

- Create your unique financial plan.
- Provide guidance in helping with elderly parents' care needs and management of finances.
- Develop exit/succession strategies for business owners.
- Assist with retirement planning decisions.
- Evaluate 401(k) and pension options.

***Contact Stephanie to arrange an introductory conversation and learn how she can help.***

***Stephanie Bennett, CWS®***
***Senior Vice President, Financial Advisor, Portfolio Manager***

For over 20 years at the same firm, I have had the enjoyment of helping individuals, families and business owners with their wealth creation and planning needs. Back in 1997, I began working with Harriman Cronk at Crowell, Weedon & Co. which merged with D.A. Davidson & Co. in 2014. We were top advisors with Crowell, Weedon & Co., and with Harriman's passing in 2014, I have continued to serve our clients. In 2014, another female colleague and I became the first women to qualify for D.A. Davidson's top advisors' Chairman's Council.

After graduating cum laude from California Polytechnic State University, San Luis Obispo, I worked in commercial property management and then found the career I love, helping people with financial planning, risk management and asset allocation. Learning is lifelong for me, and while working full-time in 2008, I attended University of Irvine's Accelerated Personal Finance Program and earned my CERTIFIED FINANCIAL PLANNER™ certification, and in 2014 I completed the Cannon Financial Institute's Certified Wealth Strategist® program.

When I'm not working, I enjoy riding my horse and competing at local dressage shows, gardening, watching my teenage daughter, Lauren, compete in soccer, and experiencing outdoor travel adventures with my husband, Steve.

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