ALLEN & COMPANY
EST. 1932

ELMHORST GROUP

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Getting Started

Our Approach | With the Elmhorst Group, we believe in a personalized approach to financial planning that puts your unique goals and aspirations at the center. We believe in building strong relationships with our clients, grounded in trust and mutual respect. Whether you're planning for retirement, securing your family's future, or aiming to grow your wealth strategically, the Elmhorst Group at Allen & Company is committed to guiding you every step of the way.

1. **Discover Your Goals And Objectives |** We begin with a thorough discovery discussion where we learn about your financial goals, concerns, and priorities.
    - Hobbies & Lifestyle
    - Retirement Dreams & Goals
    - Income needs
    - Family, Legacy Creation
    - Charitable Giving Desires
    - Tax Considerations
    - Risk Tolerance
    - Performance Expectations
2. **Share Relevant Information And Documents |** Collaborate with us by sharing relevant financial documents and information that will help us gain a comprehensive understanding of your financial landscape.
3. **Customized Plan Development |** Based on the information gathered, we design a personalized financial plan tailored to achieve your short-term goals and long-term aspirations, while managing risk appropriately, and taking the following into consideration:
    - Suitability & Diversification
    - Time Horizon
    - Current Investments
    - Income and Liquidity Requirements
    - Portfolio Managers
    - Fund Expense Ratio
    - Risk/reward Characteristics
    - Tax Efficiency
4. **Implementation with Care |** Any questions or concerns about the approach will be addressed, and adjustments will be made as needed. A personalized plan will be implemented using a blend of proven strategies and financial products chosen with your best interests in mind.
5. **Start Our Partnership |** Review the account application that outlines the terms and conditions of the relationship. Other paperwork to sign would include account transfer and/or bank information to bring in the assets to Allen&Co. Our commitment doesn't end with implementation. We will regularly review your plan, providing ongoing support and guidance to keep you on track towards financial success.

alleninvestments.com
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