LEARN ABOUT OUR 2ND OPINION SERVICE AND STRESS TESTING YOUR PORTFOLIO

TRUVESTMENTS

PEOPLE MAKE MARKETS®

We prepare clients for the significant demographic opportunities ahead.

Truvestments Virtual Second-Opinion Service

In this challenging COVID-19 economy perhaps you may be in a complex situation or just unhappy with the advice from your current financial advisor—it's not uncommon. We believe that many individuals and families would value a second opinion on their finances.

To help you instill confidence in achieving your financial goals, we have created a complimentary second-opinion service. We are pleased to offer you the same knowledge and guidance that our valued clients have come to expect of Truvestments.

Served by a Team Redefining Wealth Management

Ask ten people to define wealth management. Actually, ask ten wealth managers to do so. You will almost certainly get ten different answers, with most heavily focused on investing. As a client of Truvestments, however, you benefit from our concierge-level services, provided to you by a team which has built a clear and comprehensive vision of wealth management. The diagram below will help you envision the broad-based benefits we deliver to our clients.

Our Concierge-Level Family Wealth Management Services

INVESTMENT CONSULTING

- Asset allocation
- Portfolio management
- Manager due diligence
- Risk evaluation
- Performance analysis

ADVANCED PLANNING

- Wealth enhancement, including cash flow management and tax minimization strategies
- Wealth transfer
- Wealth protection strategies
- Charitable giving

RELATIONSHIP MANAGEMENT

- Regularly scheduled calls, reviews and in-person meetings
- A team of professionals, including legal, tax, estate risk and investment management advisors

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Our consultative process via phone or virtual meeting

We approach each new engagement with our consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to help achieve them. Through our second-opinion service you can experience our five step process with no obligation.

FULL CLIENT EXPERIENCE

DISCOVERY → INVESTMENT PLAN MEETING & MUTUAL COMMITMENT → PLAN REVIEW & IMPLEMENTATION → CLIENT EXPERIENCE & IMPLEMENTATION → REGULAR PROGRESS MEETINGS

What to expect from our second-opinion service

We will meet with you in person or if you prefer via a virtual meeting from the comfort of your own home for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, we will get together for the mutual commitment meeting. During this visit we will confirm if you are on track to fulfill your values and achieve your goals with your current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for your needs. Either way, you will receive a Total Client Profile and a personalized analysis of your current situation.

SECOND-OPINION SERVICE

DISCOVERY MEETING → MUTUAL COMMITMENT

Even if we have crossed paths in the past perhaps now is a convenient time to revisit your plan. We are here to help.

Contact us today.

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