Trailhead Wealth Management, LLC

Service. Advice. Simplicity.

Second Opinion Service

For the Friends, Family, and Associates of our Valued Clients

In this ever-changing economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor—it's not uncommon. We believe that many high-net-worth investors would value a second opinion on their finances.

In order to help the people you care about work to achieve their financial goals, we are pleased to offer a Second Opinion Service. This meeting provides your friends, family members, and associates the same knowledge and guidance that you have come to expect as a valued client of Trailhead Wealth Management.

Working with a Team that Redefines Wealth Management

Ask ten investors 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 Trailhead Wealth Management, however, we believe you will benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth Management

Investment Consulting

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

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Advanced Planning

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

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Relationship Management

- Scheduled calls, reviews, and in-person meetings
- Team of professionals, including legal, tax, insurance, and investment advisors

Our Consultative Approach

We approach each new engagement with a 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. As a valued client, you may recognize the five steps below as the process you have experienced with us. Through our second-opinion service, your friends, family members, and associates can enjoy this experience as well.

What to Expect from our Second Opinion Service

We will meet with your friends, family members, and associates for a Discovery Meeting, and then invite them back for an Investment Plan Meeting. Hopefully, we can confirm that they are on track to achieve their values and goals with their current advisor. If needed, we will suggest ways in which we can help, including recommending someone else if we are not a good fit for their needs. Either way, they will receive a Total Client Profile and a personalized analysis of their current situation.

Let us help those you care about. Contact us today!

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