

The Guidepost FORMula

A Wealth Planning Strategy for our evolving lives in an ever-changing world

Your financial needs and wants were likely quite different 5 or 10 years ago and they will likely be different 5 to 10 and 20 years from now....

That is why Wealth Planning is not a one-time event but an ongoing and evolving process revolving around your life's Critical Financial Events (anything and everything that can affect your finances).

That's why we developed and refined the Guidepost FORMula. The Guidepost FORMula brings all the parts of your financial puzzle in one place, so you always know where you are and where you are headed.

Our Guidepost FORMula process revolves around the 7 pillars of Wealth Management and at least 85 different things that West End Wealth does for our clients.

The Guidepost FORMula

