Blunt Wealth Services
Second-Opinion Service

Exclusively for friends, family, and associates of our valued clients

In this challenging 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 achieve their financial goals, we have created a complimentary, no obligation second-opinion service. We're pleased to offer your friends, family members and associates the same expertise and guidance that you have come to expect as a valued client of Blunt Wealth Services.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. 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 Blunt Wealth Services however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth management

Investment consulting	+	Advanced planning	+	Relationship management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow management and tax minimization • Wealth transfer • Wealth protection • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors *Raymond James does not offer tax or legal services. You should discuss any tax or legal matters with the appropriate professional.

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Our consultative process

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 will 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 a portion of this experience at no cost.

Full client experience

Discovery Meeting → Investment Plan Meeting → Mutual Commitment Meeting → 45-Day Follow → Regular Progress Meeting

What to expect from our second-opinion service

We will meet with your friends, family members and associates for a Discovery Meeting. If we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their 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 their needs. Either way, they will receive a Total Client Profile and a personalized analysis of their current situation.

Second-opinion service

Discovery Meeting → Investment Plan Meeting

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

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