

The “Individual Investor Wealth-Building Process” to Build and Manage Wealth



Step 1:
Define Goals and
Cash Flow Needs



Step 2:
Pick an Appropriate
Allocation



Step 3:
Identify Investing
Preferences



Step 4:
Select
Investments

Step 5:
Monitor



Review Portfolio



Life Stage or
Family Changes



*Revise as
Necessary*

*Replace
Holdings as
Necessary*