



DISCOVER, SOLVE AND IMPLEMENT

Your portfolio strategy begins with a personalized investment analysis, and then graduates through the portfolio construction process, in which multiple asset classes, multiple style allocations and multiple sectors are combined to meet your investment objectives.

The result is a well-tuned, three-step asset management process designed to respond to your individual needs while also addressing the dynamics of capital markets.

We have a proprietary model with three detailed sets of components that establish the steps to successful wealth management:

1. Protection > 2. Accumulation > 3. Growth

Our model also contains vital personal information as well as an analysis of debt.

POWERFUL ONLINE CAPABILITIES

With their S.P. Parkin & Co. relationship, clients obtain a highly sophisticated financial planning capability online. They can view all of their financial accounts, copies of tax and legal documents, insurance coverage and specific goals and strategic plans.

All financial reports are updated daily and accessible whenever wanted. Navigation is simple and easy to use. All information is secure and protected in an encrypted personal web address.

Sophisticated analysis engines allow us to track changes in your assets and changes in your life against your overall asset allocation, retirement and cash flow models, insurance program, and the financial and estate plan you initially put in place. Copies of your private documents like

wills, trusts, tax returns, deeds to your house, insurance policies and beneficiary designations can be uploaded to a secure online vault by you or your advisor, as well.

SAFELY ENCRYPTED, YOUR INFORMATION IS INSTANTLY AVAILABLE

As your financial estate grows in size and sophistication, our wealth management solution can become your single access point to consolidate and track your financial data in one secure location.

Your top holdings are listed on your home page, easily accessible along with your frequent flier miles and awards programs.

You can monitor the price fluctuations of your securities throughout the day by clicking on the security watch list. The latest financial news is also provided with snapshots of funds and stocks, market summary information and the market index.

- [Do you want to Learn more? Click to play video.](#)