

OUR INTAKE PROCESS

ASSESSMENT

Deep dive into facts & figures to evaluate your current situation.

IMPLEMENTATION

An actionable “treatment” plan to reach your desired situation.

INVESTMENT IMPLEMENTATION

If applicable, investments are managed in partnership with our Portfolio Managers.



CONSULTATION

Initial meet-and-greet to see if we are a good fit.

RECOMMENDATIONS

Delivery of findings, opportunities and priorities.

INSURANCE IMPLEMENTATION



If applicable, insurance policies are placed through HUB Financial.

ONGOING ACCOUNTABILITY

Regular reviews, rebalancing & planning through an open-door policy.



OTHER NETWORK SPECIALISTS

If applicable, we may introduce other third party specialists for implementation with accounting, bookkeeping, legal and mortgage needs.

