

# What is a CNA?

## How a client needs analysis helps fuel discovery

**A CNA involves identifying whether or not you have the means to meet anticipated and unanticipated needs.**

It helps us determine your net worth, so we can build a plan around where you are now, and what you want to achieve.

Introduction

Discovery

Planning

Recommendations

Implementation

Review

Continuous  
Contact

### How needs-based analysis focuses our work

The practice of financial planning looks at your holistic picture, but it starts with the details. The comprehensiveness of data gathered during the CNA helps us determine what level of planning you need, and the breadth and depth of recommendations to make. Luckily, our software, which is secure and compliance-monitored, makes the data gathering process flexible to your preferences and timing. You'll be able to access it at any time.

It's not just drilling down into your numbers, but that's a big part of it. We'll also discuss and develop your short and long term goals, and we will survey your investment risk tolerance to make sure you'll be comfortable with the portfolio weightings recommended by your resulting plan.

### What is assessed?

From selling your business to getting married, every major milestone comes with financial implications. If you've saved and built assets over time, you know how change literally changes your budget. Financial planning is a structural framework that helps us assess how you can best meet your specific goals.

- Occupation and benefits
- Sources of income
- Marital status
- Dependents, their ages and needs
- Cash flow (expenditures, budget)
- Health (general health, age, medical care considerations)
- Investment risk tolerance
- Taxes
- Savings
- Targeted savings accounts (education planning)
- Retirement accounts
- Other Investment accounts
- Real estate holdings
- Appreciating assets (fine art, wine)
- Liabilities, or depreciating assets (cars, etc.)
- Debt
- Insurance (for assets, life, disability, family)
- Estate planning topics
- Charitable giving

During analysis, we may discover that some parts of your picture need more attention than others. Your plan will be designed to reflect this information as effectively as possible for your situation.

Although initially gathered during our onboarding and discovery process, CNA data is most helpful over the course of our relationship. Your CNA is reviewed and updated during our annual review meetings to make sure all information is current, to discuss any new milestones or big financial decisions coming your way, and to earmark any changes that may impact your plan or your asset allocation.

**Interested? Let's get started.**

## ABOUT THE FIRM

### FOUNDING DATE

August 1, 2008

### HEADQUARTERS

Franklin, TN

### FOUNDERS

Art Haws, CFP®  
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Registered Investment Adviser  
HawsGoodwin Wealth is laser-focused on delivering high-value, unbiased wealth management services that enrich our clients' lives. Our team of CERTIFIED FINANCIAL PLANNER™ professionals work as a team to guide individual investors and corporate clients alike through the financial decisions that matter.



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