

Onboarding Overview

What to expect from your relationship with us, starting from your first meeting.

“Onboarding” refers to establishing and defining the client-advisor relationship.

HawsGoodwin Wealth’s onboarding process will form the foundation for defining the scope of our work with you. The financial information and goals we discuss will lead the structure of your financial plan. Learning more about your situation also helps us frame advisory conversations so that our intentions are clear and focused. At the same time, you’ll learn what we can do for each area of your financial life for which you seek attention. We’ll use this time to set expectations, so we are all aligned and informed. We aim to stay that way, over the long term.

So we’ve had an initial conversation, and you’re interested in moving forward. What will that process look like?

Onboarding is the first phase

Onboarding is the first phase of what will grow into a relationship that is structured to meet your needs with cyclical processes designed to scale over time to continue to meet them as they evolve.

How We Work With You

Introduction

Discovery

Planning

Recommendations

Implementation

Review

Continuous
Contact

From introduction, through discovery, and the beginning of planning, onboarding establishes our focus.

What happens when

Introduction

After an initial call, our introductory meeting happens first, where we introduce you to the firm. We hope to spend the majority of our meeting just listening to you discuss your goals, your assets, and your current financial situation in depth. We may ask follow-up questions.

Discovery

We spend some time getting you oriented with our firm, and our software, which is secure and compliance-monitored. We'll conduct what we refer to as a client needs assessment, when we gather data about all aspects of your current financial life, as well as your goals. We will also analyze your personal risk tolerance, discuss your comfort level during turbulent markets, and assess your desired time horizon for investment.

During discovery, we'll also gather your preferences for meeting tempo and will survey you on amount and type of communication you want to receive from us. (We will also survey you on our work every year to make sure you're satisfied.)

Planning

We build a holistic portfolio right for your needs. The planning process can be as collaborative as you'd like, for as many members of your family that you'd like to involve. Our financial planning software has extra resources for participation so your level of involvement can be performed at your own pace. In the beginning of the planning process, we'll open up a channel of communication with you to follow up on any action items identified in discovery, ushering our work together forward.

ABOUT THE FIRM

FOUNDING DATE

August 1, 2008

HEADQUARTERS

Franklin, TN

FOUNDERS

Art Haws, CFP®
Cam Goodwin, CFP®, CPFA

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.



Top
Financial
Advisers
2019*

FT 300 Ranking June 2019

HawsGoodwin Wealth is proud to be ranked in the **FT 300: Top Registered Investment Advisers of 2019.**

Make your mark.
Together, we'll make sure it lasts.
Get in touch for a complimentary consultation today.

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*The Financial Times 300 Top Registered Investment Advisers is an independent listing produced annually by the Financial Times (June 2019). The FT 300 is based on data gathered from RIA firms, regulatory disclosures, and the FT's research. The listing reflected each practice's performance in six primary areas: assets under management, asset growth, compliance record, years in existence, credentials and online accessibility. This award does not evaluate the quality of services provided to clients and is not indicative of the practice's future performance. Neither the RIA firms nor their employees pay a fee to The Financial Times in exchange for inclusion in the FT 300.