

Your First Year with AGILI



Signed
Letter of Engagement
& Deposit



Goal & Priority Setting



Plan Development & Implementation



Retirement
Planning



Cash Flow
Projections



Investment Review



Tax Planning



Risk Management



Insurance



Estate Planning



Employer Benefits



Education Planning



Disaster Recovery



Your Personal CFO



Planning
for Life's
Transitions



Financial
Modeling



Seamless
Coordination with
Accountants,
Bankers,
Estate Attorneys



Corporate
Perquisites
Analysis &
Negotiation



Real Estate
Analysis &
Negotiation



Quarterly
Portfolio
Review



Path to Your Dreams

As your Personal CFO, we create a personalized financial plan for today and tomorrow, help make investment decisions for your future and find little ways to enable you to spend your time doing what fulfills you.

