

Our Disciplined 4-Step Process

Purposeful Wealth,
Your Personal Legacy.
Our Passion!

GUIDING YOUR WEALTH JOURNEY



1) Discover & Assess

Gain Clarity on Your Full
Financial Picture

Organize. Evaluate. Understand.



2) Create Your Plan

Design a Strategy Aligned
with Your Priorities

Strategize. Align. Develop.



3) Implement Your Plan

Execute with Precision &
Coordination

Execute. Coordinate. Optimize.



4) Review & Revise

Adapt Proactively with Life
& Markets

Review. Adjust. Evolve.

Bringing Clarity & Confidence through our Disciplined Process

WWW.SILVERTREEWP-ASHLAND.COM

Securities offered through Raymond James Financial Services, Inc., member FINRA/SIPC. Investment Advisory Services are offered through Raymond James Financial Services Advisors, Inc. SilverTree Wealth Partners is not a registered broker/dealer and is independent of Raymond James Financial Services. Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.