

# OUR APPROACH

Because every client is unique, no two solutions from The Zakos Financial Group are exactly the same. From our first meeting, we apply our S.O.L.I.D. (Survey, Optimize, Link, Inform, and Defend) approach to your financial future.

## Survey

We need to see through your eyes before we can picture your financial future.

- How do you see your life now?
- How do you imagine your ideal future?
- What fears keep you up at night?

While it is essential that we grasp your entire financial picture, our ultimate goal is to understand your needs, your wants and even your greatest dreams. We also realize that your personal values play a large role in how you prepare for your future.

During our initial meeting and as part of every review, we conduct a Solution Survey that helps us know you better.

## Optimize

After the survey stage, we take a step back and look at your world from our perspective. We then apply our expertise to develop a strong foundation to your financial future in order to optimize your potential. We examine areas such as financial planning, tax and estate planning, and insurance requirements.

## Link

The linking stage takes the solution created for you and brings it to life. No financial plan exists in a vacuum and the unique connection between your plan and the world must be both strong and flexible. Given the dynamic nature of the world, our reviews look towards your financial future, while examining how your foundation is reacting to global conditions.

## Inform

Communication is essential to any relationship. We keep you informed and we ask that you return the favour. The Zakos Financial Group, with input from you, will review your portfolio and make necessary adjustments on a regular basis. This dynamic approach takes advantage of current market conditions and prepares for future changes. We also provide regular market commentary and timely information on our website as well as by forwarding research and other information that we think is significant.

## Defend

Your financial foundation must evolve and adapt to changes both in your life and in the world around you. 30 years of experience and our S.O.L.I.D. approach ensure that you have a defensive financial foundation which underpins a prosperous financial future.