PROMONTORY
FINANCIAL PLANNING

801.513.2545 · info@promontoryfp.com
240 N East Promontory, Ste 200, Farmington, UT 84025
www.promontoryfp.com

THE PROMONTORY PLANNING PROCESS

A clear, step-by-step approach to organizing and optimizing your financial life.

Every Promontory relationship starts the same way: we listen. Our first meeting is about you — your situation, your goals, and what you want your money to do. From there, our five-step process turns that conversation into a clear financial plan, and a team that stays with you year after year.

WHAT YOUR PLAN COVERS

CASH FLOW

Debt, emergency fund, cash management, income needs, and net worth.

RISK ANALYSIS

Identifying any risks in your current plan — and ways to minimize them.

TAX MANAGEMENT

Reducing taxes through deferrals, deductions, and tax-free growth.

INVESTING

Retirement accounts, goals, projections, and retirement income.

ESTATE PLANNING

Coordinating wills and trusts, so your plan protects the people it is for.

ONGOING SUPPORT

A dedicated team for service, planning, and investment questions — any time.

START WITH A FIRST MEETING

30 minutes to one hour · No cost · No obligation · Helpful financial feedback, whether or not we work together

Promontory Financial Planning, LLC has served families since 2010 from Farmington, Utah and Houston, Texas. Led by Brock Williamson, CFP®, our advisors act in your best interest, with plans built around your goals.

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HOW IT WORKS — FIVE STEPS

1

GATHER YOUR INFORMATION

So our advice fits your real life, we ask you to gather a few documents — last year's tax return (or an estimate of this year's income), recent statements for banking, investment, insurance, and retirement accounts, and any will or trust. Send them through our secure upload link, or simply bring them to our First Meeting.

2

FIRST MEETING

A relaxed, no-cost, no-obligation conversation — about 90% focused on understanding your financial life and goals. You will leave with helpful feedback and a few suggestions to consider. We follow up within a week, then leave the ball in your court until you are ready to move forward.

3

ONBOARDING — BECOME A CLIENT

When you are ready, we handle the paperwork and send everything to you for signature. We then set up your personal client portal — a comprehensive view of all your accounts — and a brief call with a Promontory Client Service Specialist (Kelsey or Maricruz) to review transfers and finalize your accounts.

4

ONGOING MANAGEMENT & SUPPORT

Whenever you have a question, we are here. Kelsey and Maricruz are available for any service need; Brock and Emily are ready with planning and investment recommendations — a knowledgeable team in your corner.

5

ANNUAL REVIEW MEETING

Each year we schedule a comprehensive review of your financial plan — making sure we stay on track, updating the plan as life changes, and keeping it working toward your goals.

HOW WE INVEST

Five core strategies — Preservation, Conservative, Income, Balanced, and Growth — plus small-account (SA) and tax-managed (TM) versions and an alternatives platform for qualifying investors.

Ask us for the strategy guide and fact sheets. All investing involves risk, including possible loss of principal.

SCHEDULE A FIRST MEETING

Book online: calendly.com/promontoryfp

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