Henry+Horne
Wealth Management

Client Relationship Process

We believe in transparency at every stage in our relationship. As a client of Henry+Horne Wealth Management, here's what you can expect from day one.

1 Introductory Meeting

You will meet with your Henry+Horne Wealth Management advisor so we can better get to know you and introduce you to our team and process.

2 Client Profile Questionnaire

If you feel we're a good fit, you will complete our client profile questionnaire, providing a deeper understanding of your current financial picture and your financial goals.

3 Internal Financial Analysis

Our team of multi-disciplinary professionals will review planning strategies we think will help you reach your goals.

4 Plan Presentation

You will be presented with planning opportunities and a customized financial plan complete with investment strategies and our ability to bundle your tax preparation needs with Total One.

5 Your Selected Strategy

Once you select your service model you will meet with your advisor to begin the implementation.

6 Your Operations Team

You will meet our internal operations team so you know everyone involved in your financial strategy.

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