DERIV Financial Planning

Rigby Financial Group

DERIV™ is our proprietary process that helps you get started down the path to financial stability and growth.

STEP 1:

Develop

ACTION
Establish client relationship

PROCESS
DERIV planning is a dialogue that depends on close personal contact and constant collaboration between you and Rigby Financial Group. Getting to know you and understanding what makes you tick helps us do the best job possible.

STEP 2:

Explore

ACTION
Gather documents; create specific goal definitions

PROCESS
Every plan needs an accurate starting point, so we request documents that will provide a complete picture of your current financial position. At this point, we'll also talk about your personal financial goals and your unique definition of success.

STEP 3:

Review

ACTION
Create customized financial plan

PROCESS
With your current financial position and goals as a starting point consider a broad range of options and arrive at a highly personalized, independently created solution that's built to suit your needs.

STEP 4:

Implement

ACTION
Present and explain methodology; implement the plan

PROCESS
Together, we look at the process and recommendations developed to meet your goals. As you put your plan into motion, we're there every step of the way to help you reach your financial goals.

STEP 5:

Verify

ACTION
Review, re-evaluate and adjust as necessary

PROCESS
We meet with each client frequently, as needed, to track progress and ensure that your plan is functioning as anticipated. If market shifts have occurred, goals have changed or new goals added, we retool the plan in order to remain focused on milestone objectives.

