

Our Six-Step Financial Planning Process

At Arbutus Financial, we understand that financial planning is about more than just money. It's about helping our clients discover and define their most meaningful values and goals, then applying those

goals to their Financial Plan. In order to best serve client needs, we employ a process we've developed, which is comprised of the following six steps:



The creation of your financial plan is like a new garden. Once the right selection of flowers and shrubs are made, regular care and attention is required. Just like managing your garden, we need to cultivate a relationship for success. As conditions and changes in your life happen, we work together to ensure your plan continues to meet your expectations.

