Our Process

SPM SELECT PORTFOLIO MANAGEMENT, INC.
Integrated Wealth Management
A Registered Investment Advisor

While each client will have a unique experience, the following provides an overview of Select Portfolio Management, Inc.'s (SPM) wealth management process.

Step 1: Discovery Session…

Before this meeting, you may be asked to complete a confidential questionnaire and deliver certain financial documents, such as tax returns, financial statements, etc. During your initial discovery session, your SPM Wealth Advisor will take the time to learn about your financial situation and personal goals.

Step 2: Analysis…

We then analyze your entire financial situation, identifying strengths and weaknesses with respect to achieving your stated goals. During this step, your SPM Wealth Advisor will evaluate which of SPM's Core Services are appropriate for you based on your needs and objectives.

Step 3: Planning…

Utilizing a consultative and collaborative approach, your SPM Wealth Advisor will further develop the components into an integrated Wealth Management Plan. In addition, your SPM Wealth Advisor may start a preliminary list of additional advisors to add to your team who will assist you with implementing your overall wealth management plan.

Step 4: Implementation…

Your SPM Wealth Advisor will then meet with you to review the many facets of your SPM Wealth Management Plan, including integrating the recommendations from other professional advisors. He or she can also lead and coordinate the implementation activities from all of your advisors.

Step 5: Ongoing Review…

After the implementation of your Wealth Management Plan, your SPM Wealth Advisor will monitor the performance of your investments, with an eye on market conditions and changes in your life. Periodic meetings will be scheduled with you to review and adjust your plan as necessary.

SPM Process

- Discovery Session
- Analysis
- Planning
- Implementation
- Ongoing Review

Core Services

- Financial Planning
- Retirement Income Planning
- Asset Protection Planning
- Insurance Planning
- Tax Reduction Planning
- Wealth Transfer Planning
- Charitable Gift Planning
- Succession Planning
- Deferred Executive Comp. Planning
- Business Retirement Planning