With a focus on a new generation of retirees, our company uses the New Generation Retirement system, which is based on three hallmarks of successful retirement planning: fiduciary, transparency and technology.

FIDUCIARY

Providing you with a fiduciary level of service means we are legally bound to always do the right thing for you and your family by only offering solutions that serve your best interest. Our commitment to you as a fiduciary is also an assurance to act with transparency throughout our relationship.

TRANSPARENCY

Our commitment to transparency ensures that each step of our work together is recorded and that every document and report is easily accessible to you. This is visible through a strong foundation of technology.

TECHNOLOGY

The right technology can make managing and organizing your retirement an easier process. When you partner with our company, you receive access to Generational Vault – a secure online portal that allows you to easily organize, manage and access your financial life.

Your complimentary account offers:

- Secure online account information
- Account tracking and alerts
- Document storage
- Advanced reports and analysis

Generational Vault serves as the vehicle to document and record our commitment to act as a fiduciary and be transparent throughout our relationship.

DOLPHIN
WEALTH MANAGEMENT, INC.

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NEW GENERATION RETIREMENT®

5-STEP RETIREMENT SYSTEM

★★★★★

5-STAR SERVICE

DOLPHIN
WEALTH MANAGEMENT, INC.

From increased market volatility and historically low interest rates to the loss of pensions and the rising cost of health care, the burden of retirement falls more heavily on the shoulders of individual Americans than it ever has before. But you don't have to carry it alone.

New Generation Retirement® is a holistic approach to retirement planning. It consists of a five-step retirement system that incorporates three hallmarks of our company: fiduciary, transparency and technology.

5-STEP RETIREMENT SYSTEM

1 SELECTING A FINANCIAL SERVICES PROFESSIONAL
2 FACT AND FEELING FINDING
3 STRATEGY
4 SOLUTIONS AND EXECUTING
5 ONGOING RELATIONSHIP

Together, we will traverse the five important steps in the New Generation Retirement system, where you'll explore key areas that are fundamental to successful retirement planning. You will be confident knowing that you have given careful consideration to asset allocation and risk, income planning, asset maximization, legacy planning, and tax strategies.

Let us craft a plan uniquely suited to help you thrive in this new generation of retirement.

Together, we will traverse five important steps in the New Generation Retirement system.

1 STEP

SELECTING A FINANCIAL SERVICES PROFESSIONAL

Step One explains the role of a financial services professional and introduces New Generation Retirement.

2 STEP

FACT AND FEELING FINDING

Step Two encompasses thought-provoking questions about your financial well-being. It begins with the Color of Money Risk Analysis and Strategy Assessment®, and incorporates the elements of discovery and client feedback.

3 STEP

STRATEGY

Step Three allows us to craft a holistic plan based on your goals and objectives, which is accompanied by a formal presentation using the Color of Money, Social Security Maximization and Retirement Compass reports. This allows us to engage in the important task of feedback prior to execution.

4 STEP

SOLUTIONS AND EXECUTING

Step Four uses forward-thinking technology such as electronically-generated and pre-populated forms with e-signature capabilities to streamline the process for signatures and submission.

For any potential product solution you might consider, you will be provided with any relevant company or product brochure, explanation, or illustration.

5 STEP

ONGOING RELATIONSHIP

Step Five addresses long-term client engagement and five-star service by providing you with unique technology and enhanced value-adds, such as Generational Vault®, ByAllAccounts and Wealth Watch®.

When you work with our company, each step is recorded in Generational Vault so you can be confident knowing that you have given careful consideration to every detail of your retirement plan.

NEW GENERATION RETIREMENT®