Our Investment Advisory Process:

Discovery Meeting

In this no-cost meeting, we learn about your financial goals, position, and priorities for the future. In addition, we determine if we are a good fit for one another.

Proposal Meeting

Present your personalized
Big Sheets - a visual big picture
look at your financial situation,
investment plan, and our
recommendations.

Team Onboarding

Finalize transfer of assets, introduce our Client Services Team, and launch our financial advisory strategy.

Investment Management

Ongoing consultations and Suitability Reports through our Three Pillars Investment Management Program.

A Nobel Prize Winning Philosophy Solution

Guided by an award-winning philosophy, our Three Pillars Investment Management program is built on our experienced team of Advisors, Investment Management Team, and Charles Schwab & Co., Inc, as Custodian, all working to provide you with security, service, and peace-of-mind.

CENTINVESTMENT PORTFOLIO Charles SCHWAB Investment Management Team Investment Advisors

Griffiths, Dreher & Evans, PS, CPAs has selected Charles Schwab & Co., Inc. as primary custodian for our clients' accounts.

Schedule a Discovery Meeting today!

Griffiths, Dreher & Evans, PS, CPAs
AN INVESTMENT ADVISORY FIRM OF CPAs
www.grifco.com
509-326-4054

