



Don D. Ging, CFP®

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Don Ging has over thirty years of experience in the insurance and financial services industry. Having earned the CERTIFIED FINANCIAL PLANNER™ professional designation, he provides clients with an objective and independent approach to their planning needs.

The Financial Strategies Process consists of the following six steps that help you take a “big picture” look at where you are financially.

1. Establishing and defining the client/planner relationship.

Together we will determine both of our responsibilities and how decisions will be made.

2. Gathering client data, including goals.

I ask pertinent questions and gather the necessary information to determine the advice you will need to accomplish your goals.

3. Analyzing and evaluating your financial status.

I will offer financial strategies recommendations that address your goals based upon the information you provide.

4. Designing a Plan.

I will make specific recommendations and suggest alternatives for ways to help you achieve your financial goals.

5. Implementation.

We will agree on how to implement your decisions.

6. Monitor, Update and Manage Change.

Over time your goals and objectives will change, the economy changes and your situation may change. I will setup periodic reviews to keep pace with the many variables that will affect your plan and impact your life. Using these six steps, together we can work out where you are now and what you may need in the future.



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