

MUNN | WEALTH MANAGEMENT

[HOME \(/\)](#)
[LINKS](#)
[TEAM \(/TEAM\)](#)
[SERVICES \(/OUR-SERVICES\)](#)
[IMPACT \(/IMPACT-1\)](#)
[BLOG \(/BLOG\)](#)
[TAX \(/TAX\)](#)

[CONTACT \(/CONTACT\)](#)

Most people want a plan for their financial future.

We help our clients design the right plan for a secure and significant retirement.

[SCHEDULE A COMPLIMENTARY CONSULTATION \(/CONTACT\)](#)



Investment





Our highly accredited team of professionals at Munn Wealth Management has proudly been serving clients for 20 years

\$150 Million Under Management

MEET WITH A PROFESSIONAL AT MUNN WEALTH TODAY (/CONTACT)

Let us be your guide.

Our Process is Simple





Step 1: Initial Phone Meeting

The purpose of our brief **15-minute phone call** will be to better understand your situation and determine if Munn Wealth is indeed a potential fit for your needs.



Step 2: Discovery Meeting

This meeting is an opportunity for you to learn more about Munn Wealth Management, and for us to learn about you, your desired outcomes, and **what gives your life significance**. We request that you bring any financial statements or documents that may be relevant to our conversation.



Step 3: Our Analysis

After our meeting we will create a **custom proposal** that details the ways our team can serve you, including costs, logistics, etc. We will identify planning needs related to your retirement, taxes, investments, and cash flow that you may or may not have been aware of.



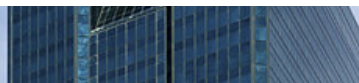
Step 4: Proposal Meeting

Our primary goal for this meeting is that you walk away with a better understanding of your financial circumstances than you had coming in. Additionally, you should have a thorough understanding of **how we can serve you** and what an advisory relationship with Munn Wealth would mean for you.

Step 5: Engagement Meeting

Upon determining that we are a mutual fit, this meeting will commence the planning process detailed in your proposal, including **necessary account paperwork** and our services agreement. It will be only one of many interactions where our team is actively working to move you closer to your desired outcomes.

SCHEDULE YOUR INITIAL PHONE MEETING





For many people finances are
emotional

READ BELOW: FINANCES AND CONTENTMENT (VS. CONTENTMENT)
ARTICLE-PDF-GSW5.PDF)



Read about contentment by David Munn,
CFP - President of Munn Wealth
Management.

Munn Wealth President,
David Munn addresses a
common issue for our
clients. **Contentment.**

Is contentment a bad thing? For some people, the words
contentment and satisfied may carry a negative
connotation. They might relate them to unfulfilled

potential, mediocrity or sloth. But contentment is not about stopping short of our best effort, it's about the motivations behind our effort. Click below to read more.

DOWNLOAD (/S/CONTENTMENT-ARTICLE-PDF.PDF)



You deserve answers.

A well-constructed plan may save taxes,
improve long-term investment returns,
and enhance quality of life.

[Approach \(/services1\)](/services1) [Impact \(/impact\)](/impact) [Blog \(/blog\)](/blog) [Team \(/team\)](/team) [Contact \(/contact\)](/contact)
[Disclosures \(/disclosures\)](/disclosures)

1323DPS