



# The WIN Method

VestGen South Barrington Process

Our team-based approach to decision making begins with our proprietary **WIN Method**.

Supporting the systematized infrastructure and scientific approach of our firm, this method is key to our comprehensive approach and helps our team work with you to pursue your financial goals so that you can feel like a winner.

## W

### Wealth Planning

The first step in VestGen South Barrington's process is to identify which financial phase of life you are currently in.

**There are 3 financial phases:**

- Wealth Accumulation
- Pre-Retirement
- In-Retirement

## I

### Integrated Solutions

Once your financial phase is identified, our team collaborates to make decisions surrounding your financial game-plan.

**We use advanced planning to leverage:**

- Investments
- Income Planning
- Legal Considerations
- Tax Strategies

## N

### Network of Professionals

We utilize additional professionals to ensure our clients have access to solutions tailored to their specific needs.

**Some of these professionals include:**

- Advisor Group
- CPAs and Attorneys
- Mortgage Brokers
- Medicare Specialists

