

Our Process Simplified

'OneSource' means that we provide a total wealth management solution. Through a proven and simple process, our multifaceted team of experts will discover and recommend the best investment, tax, estate, risk, legal and wealth strategies. Our uniquely comprehensive approach ensures peace of mind through your transition into retirement and beyond.



first step



Discovery Meeting

The Discovery meeting is designed to understand your goals, family needs and the current financial situation. Each person and couple bring a unique set of challenges and opportunities, but share a singular goal to have financial peace of mind in retirement.

second step



Presentation Meeting

After your goals are analyzed, we present you with Observations & Recommendations and Investment Policy Statement (IPS) individually written for you and your family. The O&R defines your planning strategies and the IPS defines how investments will be managed. Both are focused on creating a plan to meet your goals.

next steps



Mutual Commitment Meeting

Review and sign agreement to hire and then prioritize a list of actions to organize your accounts.

Follow-Up Meeting 45-day

Review Observations & Recommendations, check progress of investment accounts, update legal documents, and assess risk and tax strategy.

moving forward



Quarterly Process Meeting

Our commitment to achieving your retirement goals is constant. We provide quarterly updates to track performance against your goals. But we are always at your disposal to meet, to answer questions, and to listen as things change. We are the OneSource you can turn to any time.

our fee

OneSource Retirement Advisors fees are based on assets under management. There are no investment commissions. That ensures your interests are our only concern. Fees are billed at end of each quarter and may be automatically deducted. So, there are no bills to pay or checks to write, and advisory fees are tax deductible.

