

THE BLANKINSHIP & FOSTER WAY

Our proven process brings clarity, confidence and direction to your finances.

DISCOVER



Understand your situation and what's important to you.

Learn about our services and philosophy.

Develop goals, objectives and vision of your future.

CLARIFY AND ORGANIZE



Gain clarity about your resources, opportunities and challenges.

Summarize the components of your finances.

DESIGN



Design the right investment portfolio for you.

“Getting to How”:
Create a game plan to maximize planning opportunities.

Integrate planning across investment, tax, retirement, estate, and more.

IMPLEMENT AND MANAGE



Implement your plan in “Bite Sized” action steps.

Proactively manage your investment portfolio.

ONGOING GUIDANCE



Meet and review with you regularly to keep your plan on track.

Prepare for expected and unexpected life events.

Adjust planning and investments as changes happen.