

KNOW. VALUE. EDUCATE.

7400 W 130th St., Suite 100 | Overland Park KS 66213 913-529-2304 | www.msfinancialresources.com



Our Wealth Management Process

DISCOVERY

Complete discoveryprocess and discuss how we may be of assistance to you.



EVALUATION & DESIGN

Diagnostic of current situation and discuss our investing approach



PRESENTATION

Presentation of plan design



IMPLEMENTATION

Confirmation of Commitment

Our Relationship Management Process

REGULAR PROGRESS MEETINGS

Review of progress. Implementation of advanced plan.



ADVANCED PLANNING

Comprehensive evaluation of financial needs with our recommenations for moving forward.



PROFESSIONAL NETWORK

Team of carefully selected professionals with a high level of knowledge and skill in key financial areas.

MS Financial Resources is a division of Midwest Financial Group LLC an SEC registered investment advisor.