



# The Verdi Group

BAIRD

## Our Four I Process

### Keeping Four Eyes on Your Financial Vision

As your Financial Advisors, it's our job to understand your vision for the future and together create a plan to turn that vision into reality. We then implement and monitor your plan, continuously making adjustments as your life and the markets evolve over time.

That's our Four I process, and it's how we remain focused on your financial future.



## 1. Inform

Based on the information you provide in our Financial Planning Update Questionnaire, we build with you an Investment Policy Guide, a customized and comprehensive overview of your finances and investment objectives. The more information we know about you, the better we're able to serve your financial needs.

## 2. Identify

Our goal-setting document is the key to our Four I process. The reason most people don't have specific financial goals is they don't know how to write them. The process can be long and tedious and result in vague, immeasurable goals. To eliminate that frustration, The Verdi Group works with you to write SMART goals that are Specific, Measurable, Attainable, Relevant and Timely and show you how we monitor their progress.

## 3. Implement

The Verdi Group will take the information from the questionnaire and goal-setting document to establish an asset allocation model with specific investment recommendations for attaining your goals.

## 4. Impact

We regularly check in with you to ensure the plan is still in sync with your life. Have your goals changed? What do we need to adjust? What else is on your mind? We will monitor your plan's progress and fine-tune it as your goals and the market change.

No matter what you envision for your future, our Four I process can help you make it a reality. Contact one of our team members below, and let us show you how the Four I process can work for you.



**Joe Verdi CFP®**  
Senior Vice President  
Senior Investment Consultant  
563-445-6275  
jverdi@rwbaird.com



**Sydney Verdi**  
Financial Advisor  
563-445-6201  
sverdi@rwbaird.com



**Connie Heinen**  
Senior Client Specialist  
563-445-6274  
cheinen@rwbaird.com

**Baird**  
3626 Bridge Avenue  
Davenport, IA 52807