



OVERVIEW

THE WEALTH COMPASS 2024

SIGNATURE FINANCIAL &
INVESTMENT COACHING

PREPARED BY:

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About Us



SNS Wealth

Is a Financial Education & Services Company focused on wealth creation and strategy for high income early career professionals.

Trevor A. Alexander, MBA, PMP, ITIL Your Money & Investment Coach

A trusted and experienced results-driven professional.

- Masters' of Business Administration - Finance
- Bachelor's of Business Administration - Information Systems Technology
- Project Management Professional (PMP)
- Licensed Insurance, Disability, and Annuities Agent
- Licensed Realtor in State of Virginia
- Amazon Web Services Cloud Practitioner
- Certified Blockchain Expert (CBE)
- 2024 - Certified Financial Planner
- 2024 - Registered Investment Advisor
- \$1.2 Million Dollar Real Estate Investment Portfolio
- Stock Market & Retirement Investor 8+ Years
- Educated over 10,000 people

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WHO IS THE WEALTH COMPASS DESIGNED FOR ?



**AMBITIOUS MILLENNIAL
& GEN Z PROFESSIONALS**



Professionals working in **technology, business, healthcare, consulting, engineering, and government.**

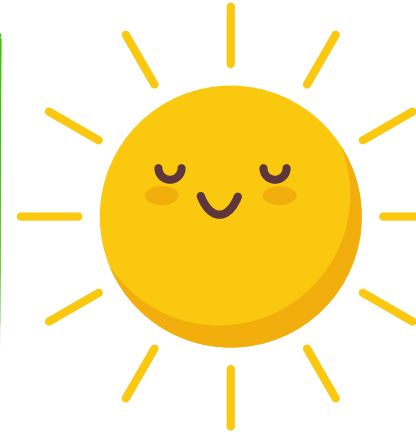
Household Income 80K-500K

**IS YOUR WEALTH WORKING AS
HARD AS YOU ?**

SOME SEE THE LIGHT

Organized. Secure. Intentional.

Americans who engage with a financial coach tend to possess a higher net worth compared to those who do not seek such assistance.



Investing in real estate demands dedication and effort, yet the rewards will magnify in five years. I am pleased to embark on this journey now.

Seizing personal and professional opportunities brings satisfaction. I value the perspective gained from seeking a second opinion.

OTHERS FEEL THE HEAT

Rushing. Anxious. Regretful.



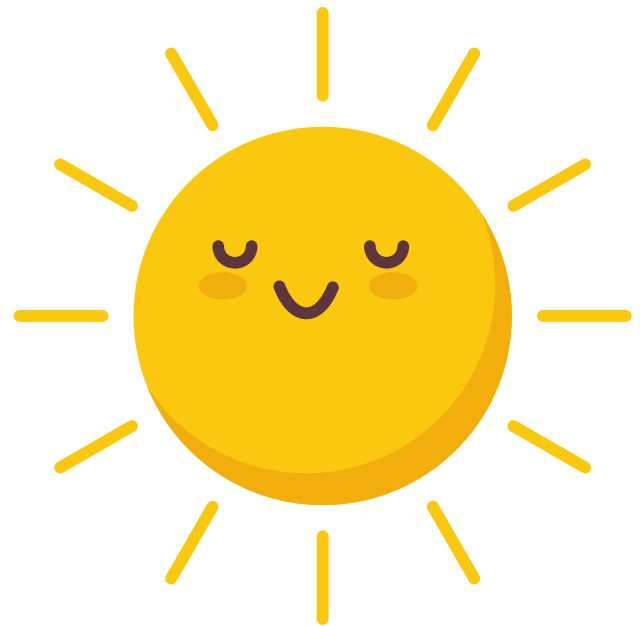
Each year without investing in the stock market results in an estimated loss of around \$30,000 in retirement income.

Making financial mistakes as a result of attempting to navigate the situation independently.

Inflation and escalating expenses are causing concern about bills and stability moving forward.

DO YOU SEE THE LIGHT ?
OR FEEL THE HEAT ?

EITHER WAY...
ITS TIME TO MOVE



Our Simple Three STEP Wealth Compass Process

Step 1:

We get started with a free financial phone consultation to understand where you are **today mentally, financially, and your desired money goals** to achieve.

Step 2:

After an initial deposit, we start your Wealth Compass Journey, using a “**do it with you approach**” to setup the key systems and actions necessary to align with your goals, all guided by our expert feedback

Step 3:

Once the work is completed, we provide the financial tools and resources for continued support in the future in case you ever need more help or accountability..

We aim to make the entire process between 2-4 meetings

THE E-SAVERS MODEL

TO MILLIONS IN ASSETS

E – EDUCATE

FOCUS ON INCREASING YOUR VALUE IN THE MARKETPLACE AND SELF-AWARENESS: ENHANCING YOUR SKILLS AND UNDERSTANDING WHAT YOU TRULY WANT MAKES FINANCIAL PLANNING EASIER BY POTENTIALLY INCREASING YOUR INCOME AND ALIGNING YOUR GOALS.

S - SAVINGS RATE

PRIORITIZE A HIGH SAVINGS RATE: AIM TO SAVE A SIGNIFICANT PORTION OF YOUR INCOME (20-30% OR MORE) TO BUILD WEALTH FASTER AND ACHIEVE FINANCIAL GOALS.

A - AUTOMATE

AUTOMATE YOUR FINANCES: SET UP AUTOMATIC TRANSFERS TO SAVINGS AND INVESTMENT ACCOUNTS TO ENSURE CONSISTENT SAVINGS AND PREVENT OVERSPENDING.

V - VARIETY

DIVERSIFY YOUR INVESTMENT ACCOUNTS: SPREAD YOUR INVESTMENTS ACROSS DIFFERENT ASSET CLASSES, ACCOUNT TYPES, AND SECTORS TO REDUCE RISK AND BALANCE YOUR PORTFOLIO.

E - EQUITIES

INVEST IN EQUITIES: STOCKS AND ETFS OFFER HIGHER RETURNS AND ARE ESSENTIAL FOR GROWTH, DESPITE THEIR HIGHER RISK.

R - REAL ESTATE

****INVEST IN REAL ESTATE:**** REAL ESTATE PROVIDES INCOME AND POTENTIAL APPRECIATION, DIVERSIFYING YOUR PORTFOLIO WITH TANGIBLE ASSETS.

S - SUSTAINABILITY

MAINTAIN FLEXIBILITY: BE ADAPTABLE IN YOUR FINANCIAL STRATEGY TO ADJUST TO LIFE CHANGES AND CIRCUMSTANCES EFFECTIVELY.



All Wealth Compass sessions are founded on our E-SAVERS Framework and the Financial Foundation Pyramid.



**“ Its important to not skip steps.
I follow this exact approach.”**

**“The Wealth Compass makes sure you
are headed in the right direction
financially.”**

Trevor Alexander, Financial Coach



Example questions the Wealth Compass answers.

Below are some very common questions we see.

Please note, questions we address will always **be specific to the client/family served.**

- Are you taking the right amount of risk ?
- Are you using your income wisely ?
- Do you have the right mix of assets ?
- Are you protected from major life events ?
- How to consider the impact of credit cards on cash flow.
- How much wealth do you need to make work optional ?
- What stocks should I consider buying ?
- Should I continue to rent or buy a home
- Are your beneficiaries setup on your accounts ?
- Which debts should you pay off first ?
- How much to put into your 401k, TSP, 403B
- How should you approach difficult money conversations ?
- And many more specific to your goals.



CASE STUDY #1

Michael, 31, Marketing Professional



Michael gained help in **rolling over his 401(k) from a previous job into a diversified IRA**. Over 6 months, his **debt reduced by \$11,000**. Michael also established an emergency fund, eliminating the stress of unexpected expenses. With systems in place, he can now focus on his career and family more.

CASE STUDY #2

Sarah, 28, Healthcare Professional



Sarah not only learned to budget effectively but also started investing. In just two years, she paid off \$10,000 in student loans and **optimized her cash flow**, allowing her to contribute \$5,000 to her IRA annually. Thanks to wise investment choices, **her brokerage account has grown by 20%, and she's on track to retire comfortably.**



FIVE (5) YEARS

Investment details

Initial deposit

\$20,000

Contribution amount

\$1,500

Contribution frequency

Monthly

Annually

Years of growth

5

Years

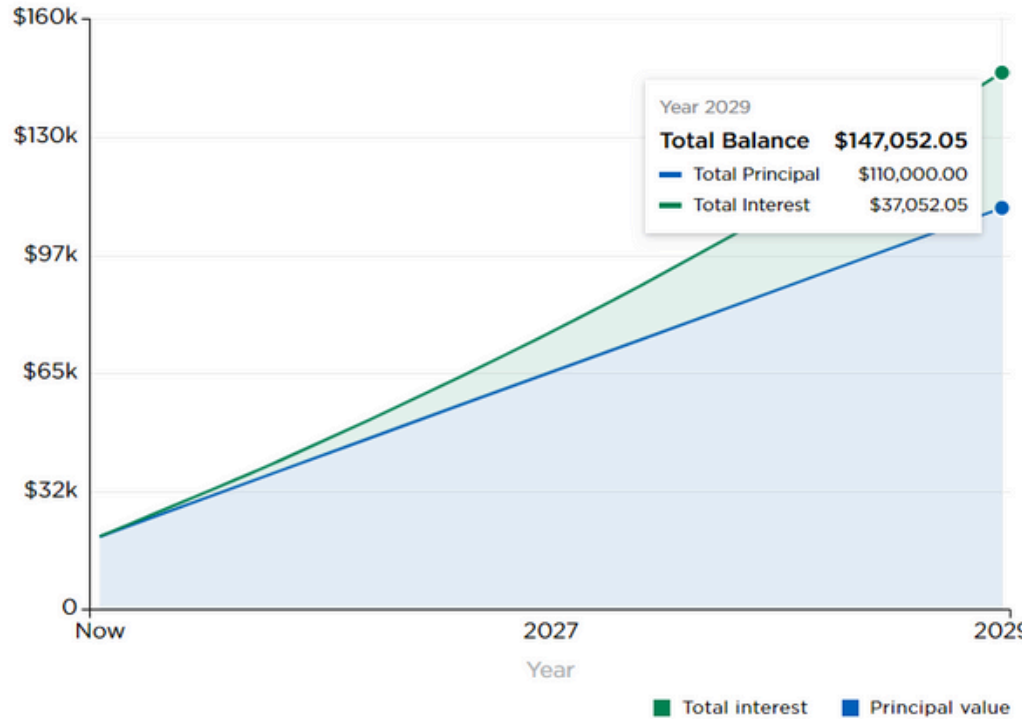
Estimated rate of return

10%

Compound frequency

Annually

Total Balance
\$147,052.05



FIFTEEN (15) YEARS

Investment details

Initial deposit

\$20,000

Contribution amount

\$1,500

Contribution frequency

Monthly

Annually

Years of growth

15

Years

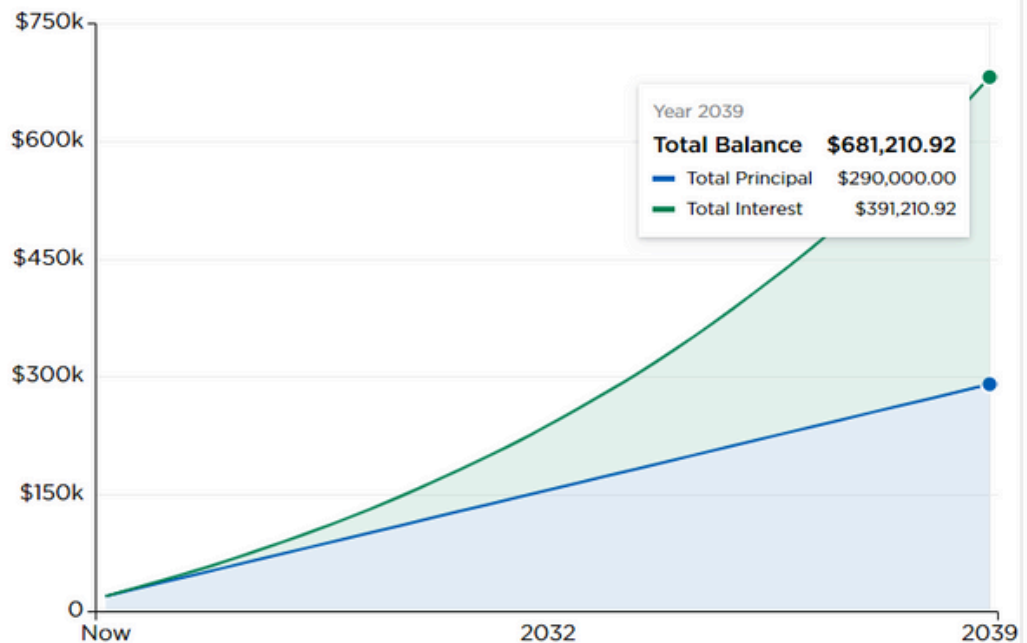
Estimated rate of return

10%

Compound frequency

Annually

Total Balance
\$681,210.92





VIP PRICING CLIENT AGREEMENT

**A One-Time \$1,200 Investment.
Everything Completed In 30-60 Days.**

Payment Plans

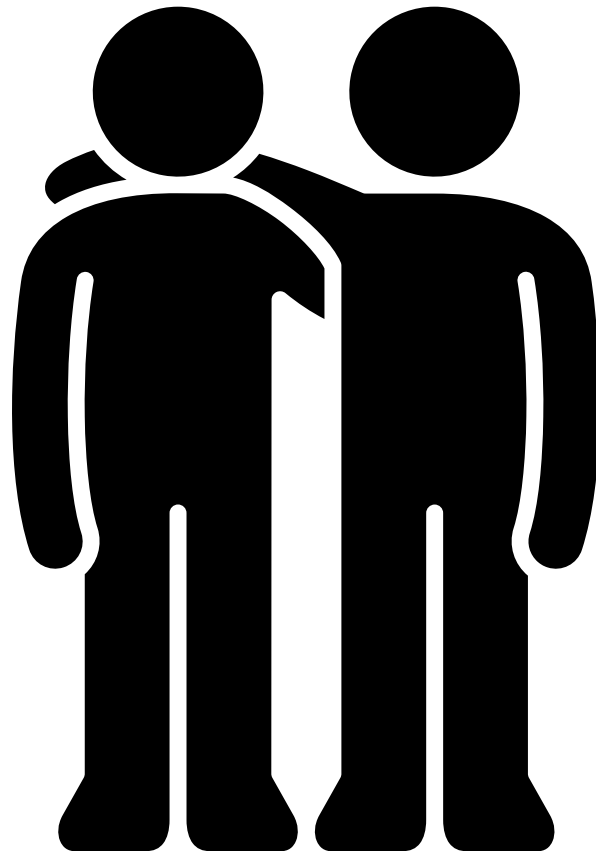
- We offer up to four (4) split payments (\$300) to fit your budget. Pay over 6 weeks.
- 10% off for Military, Educators, Healthcare, and First Responders

Additional Notes

- After the 60 day support, clients can always book paid calls at a discounted rate.
- Monarch subscription is used throughout program. The software is free for 30 days and then \$14.99 per month or \$99 for entire year. Cancel Anytime.(although you'll love it :)
- **You are eligible for compensation of \$300 for any clients that you refer to The Wealth Compass.**
- If we do not accomplish the scope of work within the desired timeframe, we will continue to work with you at no cost
- If you agree that we provide a 5 Star Experience our team will ask for an introduction to anyone you know that would benefit from our services.

Who do you know that wants to grow wealth ?

Add a Partner at No Additional Cost



Add one (1) person to your Wealth Compass Plan and they will receive the same benefits as you !





“IT'S WHAT YOU LEARN AFTER YOU KNOW IT ALL THAT COUNTS.”

100+ FAMILIES SERVED

CLIENTS 15 MILLION INVESTED

CLIENTS 90 MILLION INSURED

50,000+ EDUCATED ONLINE

15+ SCHOOLS SPOKEN AT

I LOOK FORWARD TO
SERVING YOU, LETS THRIVE
FINANCIALLY !



THANK YOU

CLICK HERE TO

SCHEDULE A FREE

CONSULTATION

THE WEALTH COMPASS





LIST OF SERVICES AVAILABLE

Financial Coaching

- Income Utilization: Advising on the wise use of income for maximum financial growth and stability.
- Credit Management: Analyzing the impact of credit cards on cash flow and providing strategies for managing credit.
- Customized Financial Planning: Developing tailored financial plans specific to clients' goals and circumstances.
- Difficult Financial Conversations: Coaching clients on how to approach difficult money conversations with family or partners.

Investment Education

- Risk Assessment: Evaluating if clients are taking the right amount of risk in their investments.
- Asset Allocation: Ensuring clients have the right mix of assets in their investment portfolios.
- Wealth Planning: Calculating how much wealth is needed to make work optional and planning accordingly.
- Stock Recommendations: Providing insights and recommendations on which stocks to consider buying.
- Debt Management: Advising on which debts to pay off first and how to manage debt effectively.
- Retirement Planning: Guidance on how much to contribute to retirement accounts like 401(k), TSP, or 403(b). Rollovers from previous and existing account as well.

Real Estate Services

- Buying and Selling Guidance: Assistance in buying or selling residential and commercial properties.
- Market Analysis: Detailed analysis of the real estate market to help clients make informed decisions.
- Rent vs. Buy Analysis: Evaluation of whether clients should rent or purchase a home based on their financial situation and goals.
- Property Investment Strategies: Guidance on real estate investments to build and diversify portfolios.

Insurance Services

- Risk Protection: Ensuring clients are protected from major life events through appropriate insurance coverage.
- Beneficiary Setup: Assistance in setting up and reviewing beneficiaries on accounts to ensure assets are distributed according to clients' wishes.

Personalized Consultations

- Goal-Oriented Services: Offering many more services specific to clients' individual goals and financial situations.