NorthStar Financial Partners recognize the importance in preparing a sound financial plan for our clients. We set the stage for them to move towards a future where they are in control of their finances and can actively move to achieve their financial goals and ambitions. As fiduciaries, we act prudently when collecting client information and document our duty to our clients. We adhere to the Certified Financial Planning Board (CFP Board) of standards for developing our financial plans. This is the basis for our motto “**Plan. Invest. Review.**”

Here are the steps below that we take in creating our financial plans for our clients:

For a complete detailed view of our financial planning process, **please click here:**