Capital Investment Advisors

Beginning to Work with Capital

STEP 1
Opening Meeting

We discuss your lifestyle, goals, retirement dreams and income needs.

We want to learn more about who you are and what you are looking for in an investment advisor.

STEP 2
Initial Analysis

Based upon our analysis, your advisor will create and then present to you an investment portfolio proposal tailored to your discussed financial objectives.

We also address any additional planning needs that have been identified.

STEP 3
Becoming a Client

At CIA, you work directly with a financial team that consists of your advisor and a client service member.

Your client service member will walk you through the onboarding paperwork and other needs.

STEP 4
Portfolio Onboarding

The agreed upon portfolio allocation will be implemented by your advisor once your account is open and funded.

Your financial team will keep you apprised of necessary updates throughout the onboarding phase.

STEP 5
Ongoing Relationship

Your financial team will check in with you regularly. We like to meet with clients at least annually to ensure your investment strategy aligns with your goals and continues you on your path to a happy retirement.

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