



# Investment Process

## Step 1

# What's your GOAL?

At Sun Group Wealth Partners, we aim to provide you with a diversified portfolio that matches your risk tolerance and helps you work towards your financial goals.



### RETIREMENT

You want to potentially grow your account for retirement.



### MAJOR PURCHASE

You want to save and invest for a home, car, vacation, etc.



### GENERAL INVESTING

You don't have a specific goal in mind, but you want to start investing for the future.

## Step 2

# What's your Investment Horizon?



If you want to invest for retirement or a major purchase, you'll be asked to indicate when you'd like to reach your goal. Your investment time frame will be the key factor in determining your initial portfolio allocations for your retirement or major purchase goal.

## Step 3

# What's your RISK TOLERANCE?

Next, you'll answer a series of risk tolerance questions to help us understand your investment preferences. We'll seek to discover if you prefer:



### TAKING ON MORE RISK

which means you'll receive more equity exposure in your portfolio.



### TAKING ON LESS RISK

Which means you'll receive more fixed income exposure in your portfolio.



### A MIXED APPROACH

Which means you'll receive a balanced mix of equity and fixed income in your portfolio.