

OUR PROCESS – COMPASS PLANNING

The compass planning process was developed by Granite Financial Partners to create a clear picture of all of the complexities involved in creating financial plans. Through this, we are able to effectively and efficiently tailor our services to the unique missions, vision, values, and goals of our clients. Our steps of “Discover, Clarify, Analyze, Design, Solve, Implement, Maintain, and Review” were carefully laid out to provide a complete process, ensuring that our clients receive the best planning and service possible.

