

WHAT WE DO

Our role at Mercator Financial is simple, to facilitate a new awareness of your wealth potential. We then work with you to develop and execute a financial plan that supports what is truly important to you. We want to help you free yourself from the stress and worry that can consume you in your pursuit of wealth.

OUR SIX STEP PROCESS: YOUR WEALTH AWAKENING

We are deeply committed to helping our clients awaken their wealth on their journey to achieve financial comfort. We adhere to a proven process to maximize the efficiency and effectiveness of your wealth. Our process incorporates many years of experience and knowledge that are vitally important to helping you achieve success.

1

SHARE THE MERCATOR EXPERIENCE AND OUR PASSION

Establishing expectations

6

REFLECTION

Sustaining your Plan to keep you on course.

5

WEALTH JOURNEY

Launching your Plan...directed action yields positive results.

2

"WHAT'S IMPORTANT" DISCOVERY

Asking the hard questions to determine what matters most to you.

3

FINANCIAL DISCOVERY

Understanding your present circumstances, attitudes and opportunities.

4

AWAKENING

Presenting your customized Plan to AWAKEN your wealth.



Awaken Your Wealth