

“Total Wealth Management is a Process, not a Product”

As fiduciaries, DWM uses prudent processes and applies them consistently:

In the area of investment management, DWM's principals apply the concepts learned in Accredited Investment Fiduciary® (AIF®) training designed to help clients gather, grow and protect assets through better investment and business decision making. Such a prudent process has been proven to improve investment returns.

In executing our value-added services, we use DWM proprietary initial and on-going procedures to understand, organize, formalize, implement and monitor our clients' financial futures. We lead our new clients through a series of in-depth meetings, sometimes called “DWM boot camp” designed to review every aspect of their financial lives. Once concluded, we continue to monitor and manage their finances using our “Increasing Wealth by Adding Value” processes which detail our work done daily, weekly, bi-monthly, and monthly throughout the year to regularly monitor, review and communicate to our clients on all aspects of their extremely important financial matters.

Our client relationship management (CRM) software, Junxure, is extremely important to us and our clients. Junxure built their CRM the same way DWM built its business, understanding the importance of providing clients with a consistent, high-level service. Within Junxure, we develop records for each client, prospect, associate, employee, etc. and keep all actions, notes, emails, and anything else necessary to maximize clients' experience, all in one place. DWM is a paperless office, which means everything is easily accessible when a client needs something done quickly. Junxure has been a major factor in optimizing this efficient approach. It truly is the hub of DWM and a big reason why client experience and internal operations run so smoothly.

Excellent processes alone don't guarantee the best possible results. You need, what DWM has; namely, an extremely high quality, passionate team ( [click&nbsp;here](#) ) and the right culture and values. As an trustworthy and accountable independent advisor, our clients are number one. Our focus is on them and adding value in every way possible. We're committed to listening, learning, resourcefulness, a conscientious attitude and, above all, integrity. ( [Click here for more on culture and values](#) )

).

---