Chicago Financial

Senior Planning Network Takes a Holistic Approach

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Looking at the Big Picture

No plan is an island.

Your financial plan directly or indirectly touches every part of your life, as well as the lives of your loved ones. Likewise, every element within that plan has an effect on the plan's total performance. Michael Jankowski knows all about this. As president of Senior Planning Network, he takes a holistic approach to wealth management. He looks at the many facets of his clients' lives and creates financial plans that work together to meet every specific need.

"We look at all aspects of our clients' financial universe to see how the individual parts are affecting each other," says Jankowski. "We view it as our business and our responsibility to thoroughly understand our clients' goals so we can leverage our experience and expertise to help them realize their dreams."

Taking Charge of the Situation

Passionate, protective and proactive describes not just his firm, but Jankowski himself. He is passionate about managing wealth and preserving it for future generations; protective in the way he views himself as not just a financial advisor, but as a financial guardian; and he proactively stays on top of the markets and keeps in close contact with his clients. "Continuous client contact is at the foundation of everything we do," he says. "We look to inspire our clients to make informed decisions. We work to not just meet, but to exceed their expectations through education and communication."

This attitude helped lead to Jankowski's recognition as a 2010 FIVE STAR Wealth Manager℠ by *Chicago* magazine. The award honors less than 2 percent of the over 31,000 wealth managers in the Chicago area for superior overall satisfaction. With more than 20 years' experience managing wealth and minimizing risk, Jankowski has deep ties to the community and a special connection that allows his firm to give its clients close attention. "We get to know clients on a personal level above and beyond their financial goals," he says. "That way we can make appropriate decisions based on them as people, not merely as investors."

Independent, Yet Well Connected

As an independent firm, Senior Planning Network is able to offer the most advantageous products in the marketplace. It partners with an outstanding network of outside resources, including some of the leading CPAs and estate planning attorneys in the Chicagoland area. Client education is a major priority. Jankowski and his team are dedicated to simplifying the many complex financial options available. For 15 years, he has been teaching public education workshops on asset preservation and wealth transfer strategies throughout the area.

"I fully enjoy working with my clients," says Jankowski. "I look at them as friends, and I consider myself responsible for their financial well-being. Whether it's tax strategies, estate planning or asset management, they can count on us. We have the tools to help clients build a future they can look forward to."

Michael Jankowski

The Senior Planning Network Process

A step-by-step process helps educate and advise clients as they prepare for their future and the future of their loved ones. The process includes:

- Identifying goals
- Designing a plan specific to the client's unique needs
- Assisting in the implementation of the plan
- Monitoring and adjusting the plan over time as needs change

If you would like a complimentary consultation with Michael Jankowski, please contact him directly at michael@seniorplanningnetwork.com.

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Managing Wealth Across Family Generations

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