

Who are your First Five phone calls?

Who do you call when something happens in your life?

...Something **really good** when you want to celebrate or something **really hard** when you need encouragement, support and honest guidance?

- Engagement/Wedding
- Buying a new home
- Celebrating the birth of a baby/grandbaby
- Taking a dream vacation
- Building a beach home
- Accepting a new job
- Receiving a promotion
- Retiring
- Losing a loved one
- Receiving difficult health news
- Losing a job
- Natural disaster
- Divorce
- Injury, disability or accident
- Inability to work



Our goal is to be on your First Five list because we care and because there is always a financial implication.

Our Process

We take a focused and tailored approach to our comprehensive financial planning process that involves understanding your unique financial objectives and designing a strategy that strives to build and preserve your wealth over the course of your lifetime and events.

We work diligently for our clients to earn the opportunity to be a First Five phone call. We understand that this position is sustained through exceptional service. We consider it a privilege and honor to be a First Five.

Our Objective

As a First Five, our objective is to empower, educate and advocate for you in your decision-making process as you navigate your life event.

Partnering with you allows us to live our purpose-driven mission and to act as a catalyst for your future.





15 Middleton Dr. Wilmington, DE 19808

302.234.5655

ContactUs@CovenantWealthStrategies.com

www.CovenantWealthStrategies.com

*The team at Covenant Wealth Strategies is a catalyst,
striving to build financial security, see dreams fulfilled
and create enduring legacies.*



Scan the code above to visit our website.