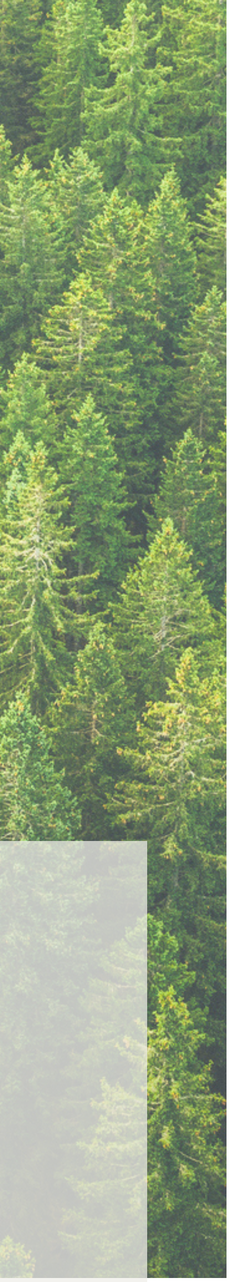

Financial Planning Process

Identify Your Goals

Goals. Hopes. Dreams. This is the starting point of your financial plan.

- We will work to understand what matters most to you, what concerns you and all that you'd like to accomplish with your money.

Gather the Details

Gathering the details of your financial life can be tedious. Be patient! The completeness of the information you share is essential in creating a plan personalized to your family.

- Once we have your data, we will hold a "red pen" meeting to confirm this information.

Develop a Plan

The next step of the process is on us. My team will leverage industry-specific software to develop a plan that includes all aspects of your financial world. We will analyze your information and make recommendations to bring you closer to your goals.

- You can expect a series of meetings as we work together to prioritize action items and implement your strategy.
- We will collaborate with your CPA, attorney or other trusted advisors to help bring the plan together.

Design and Implement an Investment Strategy

Your investment strategy depends on your personal circumstances and should be tailored to your time horizon, capital, risk tolerance, and goals.

- We will provide an analysis of your current investments and help you determine if changes need to be made.
- When appropriate, we will customize and implement an investment strategy aligned with your financial plan.

Benefit from Ongoing Advice and Oversight

With your financial and investment plans in place, we can transition to the next phase of our relationship, monitoring and managing your finances on an ongoing basis.

- We will hold regular meetings to keep you on track and to review your investment allocation, strategy, and performance.
- We encourage you to reach out to us throughout the year with financial questions or if life throws you a curve ball.
- Think of us as your financial partner, so you can focus on the rest of your life.

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