

## **Our Financial Planning Process**

## ..... Your Roadmap to Financial Success

Our comprehensive Financial Planning Process will help identify gaps and opportunities, allowing us to provide strategies to help you achieve a sound financial future.

## **STEP 1: GETTING STARTED** Gather Data **Establish and Clarify Goals STEP 2: INITIAL ASSESSMENT AND STEP 5: PROGRESS ANALYSIS** Provide ongoing support Review, Assess and Analyze your current Make adjustments as needed situation Follow up and review progress Assess dangers and opportunites STEP 3: RECOMMENDATIONS and **STRATEGY** STEP 4: IMPLEMENTATION Review your options Provide actionable solutions **Present Strategies and Solutions** Work with you to implement Cash Flow Coordinate with referral **Debt/Asset Management** partners as needed Tax Planning **Estate Planning** Risk Management Investment Management/Review

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