

STRATEGIC PLANNING PROCESS

Meet and Gather Facts

You:

Tell us your goals, dreams, aspirations

Explore financial planning tools

Begin to set goals and explore possibilities

Us:

Help you define your goals

Understand what's important to you

Assess current financial situation

Describe how we work together

Organize & Analyze

You:

Provide any additional information

Link financial accounts

Us:

Complete in-depth data gathering

Brainstorm as a team to offer solutions

Provide strategic financial forecasting

Prioritize implementation

Engage & Assess

You:

Understand what's next financially

Communicate and ask questions

Commit to financial plan

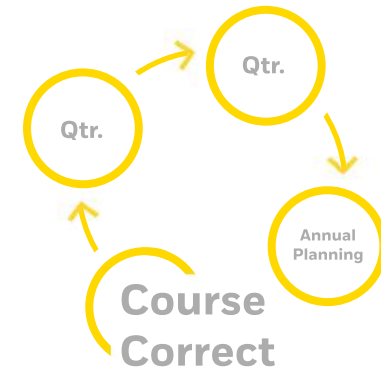
Us:

Illustrate recommendations

Prioritize implementation

Implement strategy

Provide timeline and tactics



Course Correct

You:

Communicate changes & updates

Commit to updates in plan

Us:

Proactively monitor your financial progress

Objectively provide administrative assistance

Track & communicate progress

Continuously improve and educate to better serve you