

# The Seven Steps of Our Planning Process

01

## Getting to Know You

Get acquainted, discover your goals and objectives, and determine if we're a fit



02

## Get Organized

Catalogue your financial world and snapshot your finances as they currently are



03

## Verify

Confirm your objectives, timeframes, and the information we have gathered



04

## Explore & Analyze

Brainstorm and evaluate strategies to meet your goals



05

## Delivery

We'll share our recommendations for the best way to meet your objectives - and the models we ran to back it up



06

## Implementation

Execute on the changes necessary to put your financial plan in motion



07

## Monitoring

We have 90-day ongoing check-ins to ensure you stay up to date on on track



Find out more at:

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