



The Wealth Evolution Experience™

The Envision Conversation **1**

What do you want to achieve? What about money and life is important to you? What would you most like to do if you had more time and/or resources? Do you have a strategy for managing your investments? What is your vision of retirement?

By getting to know you on a personal level and understanding your specific goals, values, and dreams, we can determine whether our services could provide value to you.

RESULT: **CLARITY**

The Discovery Process **2**

Through gathering detailed information about you, your values and your financial situation, we work with you to establish clear, reasonable, and achievable goals. We discuss your current financial and life situation and empower you to envision where you would like to be at defined points in time.

RESULT: **DIRECTION**

The Empower Roadmap **3**

Using the information from *The Discovery Process*, we provide a personalized strategic plan that reflects your objectives and is custom-designed to help you best achieve your goals. With your roadmap in hand, we help ensure that your goals and dreams are put into action, and that all components of your plan are professionally coordinated and fully integrated with your tax and legal programs, and all other important aspects of your life.

RESULT: **EXECUTION**

The Freedom Expander **4**

Your wealth evolves as we continue to monitor, update and revise your *Empower Roadmap* to help ensure that your plan remains current and continues to meet your objectives.

We expand your confidence by keeping you informed of pertinent economic, tax and financial issues. In addition, we coordinate and collaborate with your other advisors, such as your accountant or attorney, on an ongoing basis, acting as your full financial concierge. **Most importantly, we act as your catalyst to empower you to continuously evolve to help you achieve the freedom you desire.**

This outstanding client service model enables us to best provide ongoing wealth evolution, confidence and freedom for all your unique planning needs.

RESULT: **EVOLUTION**