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Four Step Process

We employ a four step process:

- *First is a holistic document audit to get a broad overview of what the client has in place and what the client may yet need.*
- *Secondly, we work along with the client to establish and clarify specific goals.*
- *The third step is analysis and design. Analysis aids in determining where there may be obstacles in attaining goals.*
- *During the fourth step we explain to the client what their current situation is. We focus on education which helps engage the client in a creative process.*

Our entire process is accomplished through a highly synergistic team approach.

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For more information on the practice, please visit www.financialplanningmatters.com.