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The Person Who Can Benefit Most From Our Services:

- Values Financial Advice and is willing to take action
- Wants to engage in a long-term relationship
- Wants someone to trust and grow with
- Demonstrates willingness to be educated
- Doesn't expect us to time the Market
- Shows commitment to family relationships
- Is future oriented
- Is able to talk about goals, wishes and fears
- Shows respect to all staff
- Is not excessively focused on the cost of services or investment returns
- Meets established criteria for new client relationship

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