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**The Value Assessment-** This is where we can determine together if our financial planners can bring value to your financial situation.  We can also determine which planner in our firm is best suited to work with your unique situation.  If we both feel that we can bring value to you, we will discuss a fee for future services that our office provides for you.

**The Discovery Process**- We will discover the information in your situation critical to your financial success.  We will discuss your goal and objectives.  We will also talk about what money means to you and how you want it to impact your future, and your future legacy.

**The Clarity Breakthrough** - We will analyze your situation and bring back to you a real time appraisal of where you are in relation to your goals and objectives.  You will have a very clear picture of where your strengths are and what may be mis-aligned in your financial picture.

**The Navigation Strategy**- We will first educate you about the variety of solutions that may work in your situation.  We will then provide you with a step by step strategy to address any gaps in your planning and to build upon the strengths you already have.  You are free to implement this strategy with any advisor that you wish.

**The G.P.S. Implementation**- Should you decide you wish to work with us further, we will guide you through the complex process of putting our recommendations into action.  We will also follow up with you and your group of other trusted advisors to make sure you stay on track implementing pieces of the strategy that may not directly involve us.

**The Guidance Advantage**- We believe in supporting you on an on-going basis.  We look at our clients investments quarterly to re-analyze their performance relative to their peer group.  If we see necessary changes, we will communicate with you directly.  If something is not working the way we have hoped for - YOU WILL HEAR IT FROM US!

**The Expansion Review**- From time to time, we will evaluate the success of your G.P.S. strategy, review changes in your life and update the strategy accordingly.