



YOUR GUIDE TO THE FINANCIAL PLANNING PROCESS

What to expect from Cascade Guided Wealth:



Free consultation meeting to assess scope of planning.



Gather and aggregate financial data.

- Collect all the details of your personal financial life, including Social Security, investment accounts, retirement assets, insurance, benefits, properties, trusts, etc.



Review financial plan and clarify investment strategy.



Implement plan items. Monitor and adjust.

- We will assist you in implementing agreed upon investment strategies.
- We will set you up with tools to view and track your accounts.



Expect the unexpected.

- When life changes, we are here to be your resource for all things financial. Whether it's a job change, financing college, a property sale, divorce, or a family loss, we are here to help you evaluate and navigate life's challenges.

Lauree Harrison is a Financial Advisor offering securities and advisory services through Cetera Advisor Networks LLC, member FINRA/SIPC, a Broker-Dealer and Registered Investment Advisor. Cetera is under separate ownership from any other named entity.

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