



SOLANO STRATEGIC FINANCIAL ADVISORS

“The Sully Solution”

1

DISCOVER

To help deal with the certainty of uncertainty, we'll work closely with you to align your behavior to your goals and values, to help secure the future you imagine for yourself.

4

MONITOR

We will regularly review the progress of your plan against benchmarks and changes in your life, and make adjustments as needed.

2

PLAN

Using the alignment model, we'll develop a written plan or proposal that will outline recommended income, recommended strategies and benchmarks that we'll measure.

3

IMPLEMENT

Using the SMART Money Philosophy, we will select the tools and resources needed to implement your strategy and to help meet your unique needs and goals

