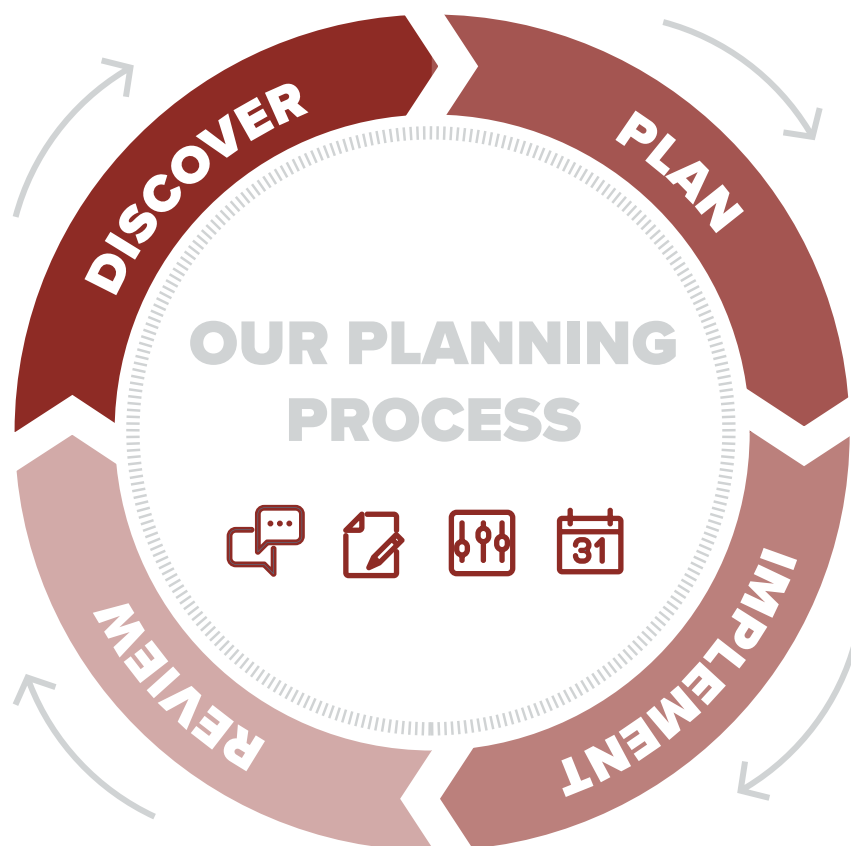


# CUE Financial Group VIP Process



## 1 DISCOVER

We'll work closely with you to understand your goals, values, current financial status, income needs and the future you imagine for yourself.

## 2 PLAN

We'll develop a written plan or proposal that will be presented to you, outlining recommended income, strategies and benchmarks we'll measure.

## 3 IMPLEMENT

We will select the tools and resources needed to implement your strategy and to help meet your unique needs and goals.

## 4 REVIEW

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



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