

## BE IN CONTROL OF YOUR FINANCIAL FUTURE

*We'll show you the possibilities. You'll choose the path you want to take.*

**You do not need to consolidate assets, write new insurance contracts nor buy products to receive fiduciary partnership for any part of your plan.** Financial planning is more than investment strategy. We understand life's challenges and value our ability to organize and simplify your wealth, create scenarios for pursuing your goals, plan for unpredictable events, and communicate proactively.

Financial planning is essential to deal with risk, investment strategy and protection for your financial household. In order to ensure your money is where it needs to be, you must know how your entire financial puzzle fits together.



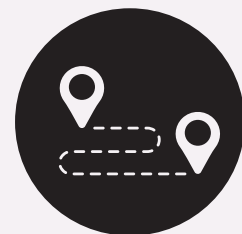
### FLEXIBLE FEE STRUCTURE

Our fee only engagements are mutually determined by you and your advisor and are tailored to you. You only pay for the planning services and expertise you request.



### WHAT KEEPS YOU UP AT NIGHT?

Concerns about your financial responsibilities and personal life are often intertwined. We are dedicated to supporting you in making solid decisions by providing clarity on complex issues.



### PERSONALIZED ROADMAP

We create customized planning road maps to show you what you've accomplished, where you were, and where you are headed next. We communicate proactively so you can keep your eyes on the road ahead.

## FINANCIAL PLANNING SERVICES INCLUDE:

*Investment Planning, Estate Planning, Income Tax Planning, Retirement Planning, Insurance Planning, Business Planning, Family Needs Planning, Financial Basics and Education*

## THE LEVEL FOUR PLANNING PROCESS



### WHAT KEEPS YOU UP AT NIGHT?

Thoughtful listening is at the core of what we do and one of our fundamental values. We listen to what you want to accomplish rather than forcing a model. Our first step is allowing you to express what is on your mind through our interactive review.



### CREATE A ROADMAP

Our planning team then works directly with your advisor to create a customized month by month plan to address your concerns. We take the time to help ensure your plan fits with your priorities and goals.



### PLAN

The next step involves generating reports and recommendations based on where you are now and where you'd like to be. You'll see a complete picture of your financial life on your personal website with your documents stored in an easily accessible and secure location.



### COMMUNICATE

We believe in proactive communication and providing clarity that goes beyond technical knowledge. We strive to address your needs before they arise by allocating resources and providing practical wisdom.