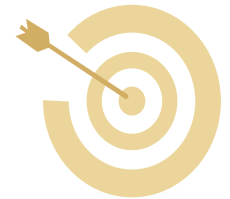




SINGLE PURPOSE PLANNING

The Relevant Review



1

THE VALUE DISCUSSION

The introduction of how our boutique firm can enhance your situation and how we make a difference

2

THE DISCOVERY CONVERSATION

A discussion to understand what may or may not be relevant and sustainable with your current investments or insurance

3

THE DISCLOSURE PROCESS

The collection of details and information regarding current products & strategies

4

THE ACTION PLAN

The analysis of your actions compared with your goals and review of gaps needing attention

5

THE IMPLEMENTATION PROCESS

The management of actions to improve your financial well being

6

THE PROGRESS REPORT

The review of progress of current strategies and future action items to maintain confidence in your plan