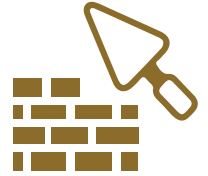




THE FOUNDATION PROGRAM™

Built to solidify the financial foundation for emerging Executives and Entrepreneurs



1

THE VALUE DISCUSSION

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

2

THE ENGAGEMENT DECISION

The decision of how to engage our firm

3

THE DISCOVERY PROFILE MEETING

The discussion to establish clarity and document your vision, values and goals

4

THE PLANNING MAP

A focused plan of action items resulting in **decisions** to align your planning solutions to your vision, values and goals

5

THE DISCLOSURE PROCESS

The collection of details and information regarding current products & strategies

6

THE SIMPLE WEALTH ACTION PLAN

A consolidated view of your net worth, cash flow as well as track towards financial independence

7

THE IMPLEMENTATION PROCESS

The management of actions to improve your financial well being and achieve desired **results**

8

THE PROGRESS REPORT

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