Our firm's mission is to empower clients, and advocate for their best interest. Delivering clear, objective information, wisdom and fiduciary counsel.

Planner Actions	Plan Stage	Client Actions
We explain the nature of advisory services, our process, and how we are compensated. Then we determine your relationships with other advisors and explore the potential for a professional relationship with our firm.	**Phone Interview/ Initial Meetings** (30 to 45 minutes)	Let's have a ***Conversation for the Journey*** you're on. Discuss your ***Goals & Objectives, Issues & Situations, Commitments & Passions, Values & Legacy, and Expectations & Intentions***. You may decide to engage the firm at this time.
First, we will review the scope of our new relationship; set timetables, discuss initial expectations and review checklists. A **Client Advisory Services Agreement** will be executed. We will start the planning process by accumulating and organizing the information we will be analyzing. During this discovery process, we will evoke additional thoughts and feelings about your past, the present, and your future.	**Data Gathering & Discovery** 1 to 10 hours (continuous)	Together, we'll gather important documents and necessary data, discover what your life is about, and share additional thoughts and feelings about topics introduced above.
We review and analyze your total financial condition, identify personal and financial values, and address financial problems. We'll assess your risk/reward profile, evaluate assets and liabilities, cash flow, your investment philosophy, tax strategies, estate plans and more.	**Analysis & Evaluation** 4 to 8 hours (typically, 4-6 weeks)	During this stage of the plan process, you'll provide additional feedback as requested.
We begin preparation and development of the plan with input from other advisors and consultants as required. We study alternative strategies and financial management techniques, then formulate recommendations to guide and achieve goals and objectives that are consistent with your resources, attitudes, and beliefs.	**Formulation** 2 to 4 hours (plus adjustments)	Adjustments to the plan are made according to different scenarios, what-ifs, and expected outcomes.
Your plan is finally ready! Together we discuss areas that need attention and provide you with a custom implementation schedule.	**Presentation** (1 to 2 hours)	We review the plan, answer any questions you may have, and discuss changes. You may decide to authorize us to implement our recommendations or elect to use someone else. It's up to you.
If elected, we help you to implement and co-ordinate plan objectives with other family members, employees, and other professionals.	**Implementation** (optional)	You decide to work with us and other team members to implement your plan.
If elected, we continuously monitor the plan's progress and advise you on factors which may affect achievement of your stated goals and objectives.	**Performance Monitoring** (optional) ***"LifeGuide"***	You decide if you would like to consult with us about **LifeGuide Advisory Services** or other monitoring services.
We notify you whenever plan revisions are needed and communicate with Client on pertinent issues.	**Plan Reviews & Revisions** (as determined)	You advise and update us on changes and events that are, or may be, impacting your life and financial well-being.

Our firm's vision is to provide comprehensive, ongoing, personal guidance…with an open and loving heart, for outstanding families, through all of life's challenges and transitions.

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FIDUCIARY ADVICE | LIFE PLANNING | FINANCIAL MANAGEMENT

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