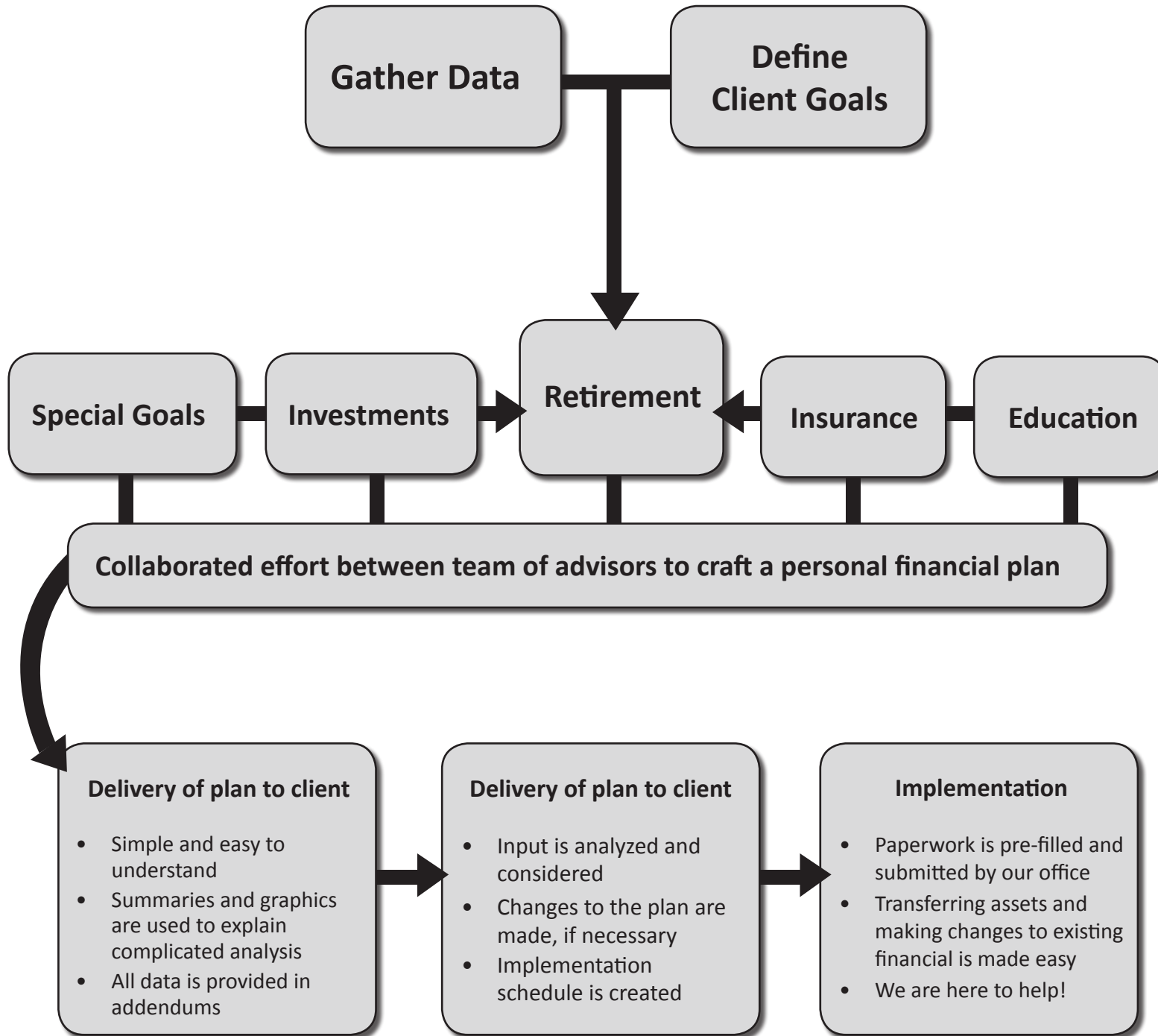


# Our Unique Process



## Phase One:

In the first phase of financial planning, we gather data and define client goals. These happen simultaneously, and defining your goals is an open discussion between your family and ours.

## Phase Two:

In phase two, all of the individual sections of your financial plan are considered, and combined into a cohesive financial strategy for your future.

## Phase Three:

Phase three lasts a lifetime and beyond. We pride ourselves on our strong ongoing relationships with our clients and our dynamic financial plans.