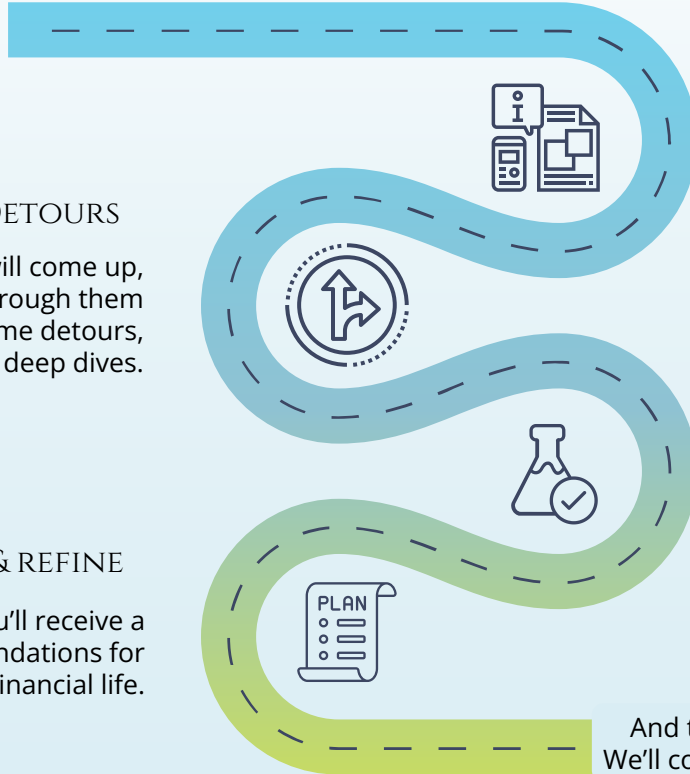


FINANCIAL PLANNING ROADMAP



GATHER DETAILS & CHECK FACTS

Statements, policies, account values, goals, plans, questions... we want them all so we can focus on what matters most to you.

ANALYSIS & STRESS TESTING

We'll take a year-by-year look at your future, and test your plan for scenarios that keep you up at night, the predictable, and unpredictable.

TANGENTS & DETOURS

Important topics will come up, and we'll walk through them together. We welcome detours, tangents, and deep dives.

RECOMMEND & REFINE

When complete, you'll receive a list of recommendations for every part of your financial life.

And the best part, **planning never ends.**
We'll continue to refine as your life evolves.