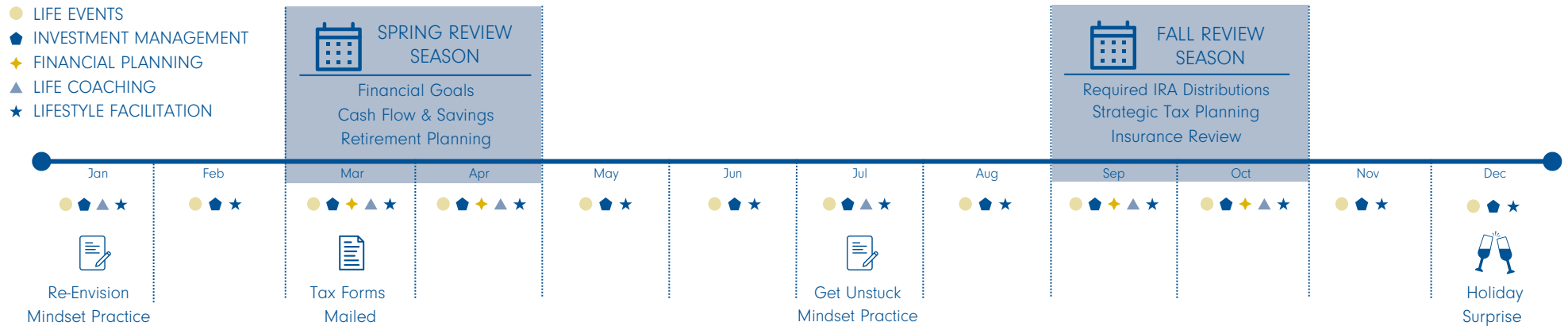


Client Experience Calendar

Get Clear & Gain Confidence.
It's time to feel good about money again.



Planning is a
process, not
an event...



Life Events

Retirement Transitions
Death/Inheritance
Selling Home
Any \$ Related Question



Investment Management

Diversified
Low Cost
Tax Management
Withdrawal Guardrails



Financial Planning

Retirement Income Planning
Tax Planning
Estate Planning
Insurance Planning



Life Coaching

Identify Money Mindset Blocks
Reimagine Your Life Purpose
Resolve Financial Conflict



Lifestyle Facilitation

Attorney & CPA Coordination
Snowbird Coordination
Organize Document Storage
Create Monthly "Paycheck"
Deposits