



FINANCIAL PLANNING

Before you start...

GOALS

- ✓ Create a financial plan to focus and guide your investment strategy.

CAN'T YOU JUST INVEST MY MONEY?

You wouldn't climb into a car and just start driving in a random direction. We need to understand where you're headed and how we'll get you there.

A financial plan details your cash flow needs for years to come. This awareness is precisely what we need to safely and effectively invest your money.

NOT CONVINCED? WE DO IT FOR FREE.

We are 100% committed to conducting Financial Planning before working with new Investment Management clients.

To this end, we incentivize new customers by crediting back ALL Financial Planning fees for those who continue on with us into Investment Management.

Why do we do this? Because we feel it is our job to help people with their financial lives - not just chase dollars.