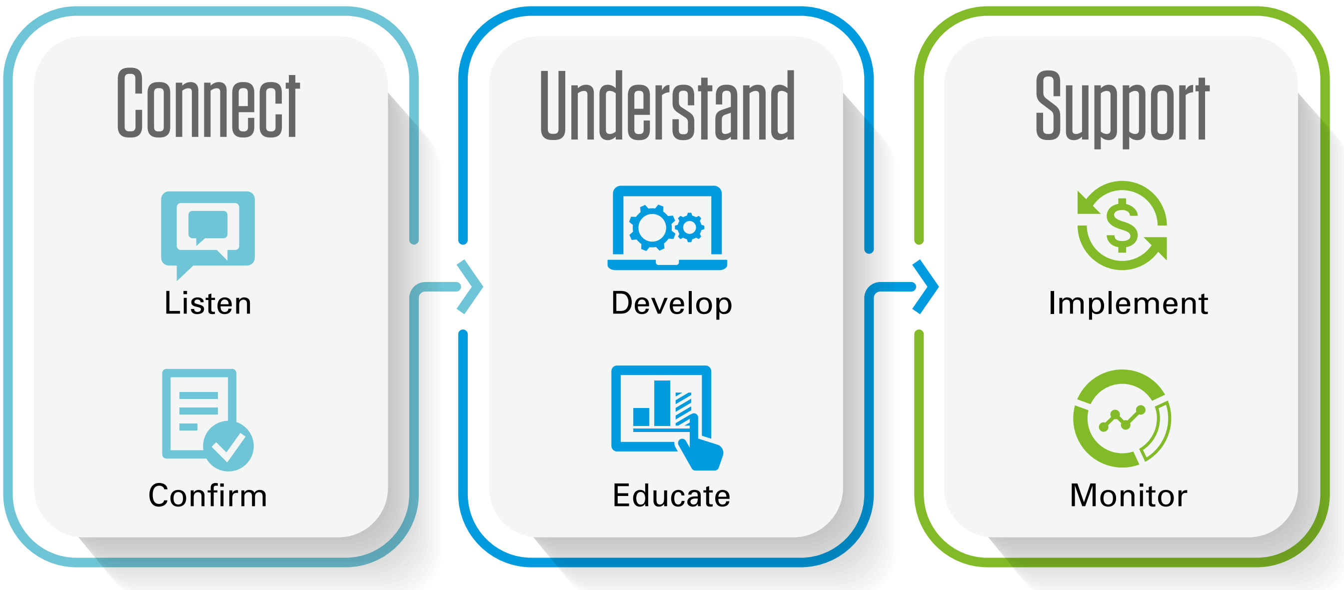
Our Financial Planning Process: It's All About You

In addition to the current wealth management services you receive, you can now engage us to provide additional financial planning services. Here's what you can expect through our financial planning process and enhanced service model:



Connect

LISTEN to You

Our first step is to learn as much as we can about you — your goals, values and unique life situation. Our role is to listen carefully, ask good questions and fully understand what you want to accomplish in life.

CONFIRM Your Financials

Once we understand your life goals, we will work together to gain a complete picture of your current financial life, making sure we are on the same page and ready to move forward.

Understand

DEVELOP Your Plan

With your goals and current financial picture in mind, we can now develop a personalized financial plan that will help you overcome your financial challenges and pursue your goals.

EDUCATE You About Your Plan

Once we've developed your plan, we help you understand our recommendations and make you aware of any strengths or weaknesses in your financial situation.

Continued

Support

IMPLEMENT Your Plan

After getting educated about your plan, you are now ready to implement the recommendations. Together, we will work on overcoming any challenges you may face in implementing your plan.

MONITOR and Adjust Your Plan as Necessary

Because your life is always evolving and changing, your financial plan will need to evolve and change too. We will meet on a regular basis and continually monitor your progress. We will make changes as challenges arise so that you can feel confident that you are continuing to make progress pursuing your financial goals.

This material was prepared by LPL Financial, LLC.

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