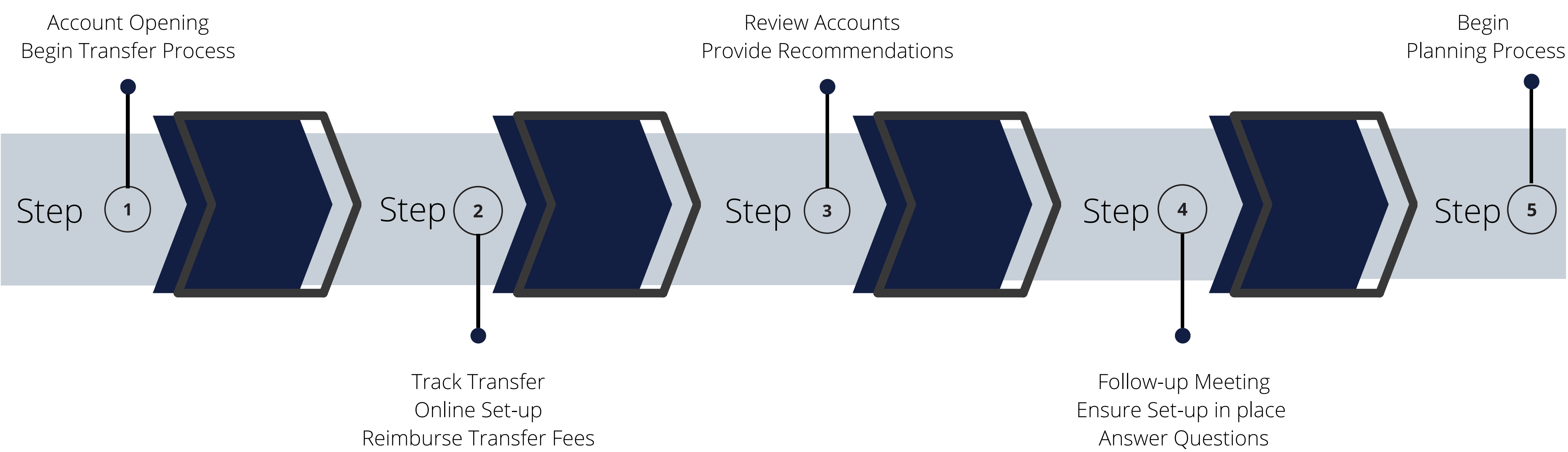
Client Onboarding

What to expect when you become a client



7 Core Planning Areas

- Investment Management*
- Financial Planning
- Insurance Analysis
- Cash Flow Management
- Debt Management
- Tax Efficient Strategies
- Will and Estate Planning

What Makes Us Different

As advisors, we all have the same access to investments (and deal with the same investment providers), offer the same services and provide the same account protection.   I don't want to oversimplify it, but I'd have to say our difference comes down to our process, the client experience.and our fees.

Our Process: I have a simple and clear process that organizes your financial life. It puts every piece of the puzzle together as your life unfolds and your needs evolve - you always have the complete picture.

Client Experience: I put a big emphasis on the client experience, to ensure the people I work with have confidence they are going to be ok regardless of what is happening with the markets

Our Fees: I provide a fair fee for the service provided. I believe I have one of the lowest advisory fees in our area, allowing you to keep to a significant amount more of your hard-earned money for you and your family - while still providing a wide range of investment options and no change to the quality of your investment servcies.

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