Financial Strategies

Wealth Management Group

a Registered Investment Advisory firm

A well-designed financial plan enables you to make more informed choices regarding your finances so you better control your life and assets.

Because creating **Your Personal Review** will be easy and painless, it's it worth spending an hour or so with us? *Of course!*

Our process:

Step 1: Discovery

- Your goals, risk tolerances, income needs, taxes, leaving money to heirs or charity
- What is the purpose of your money?

Step 2: Financial Review and Analysis

- Review your current portfolio (including fees, risk, types of investments, etc.)
- Provide a general overview of what's working for you, and where improvements could be made to help you achieve your goals.

Step 3: The Plan

- Construct a personal plan that works for you
- Present, get feedback and make adjustments, as requested
- Implement and monitor your personal plan.

No one can and no one should offer an opinion or advice on specific investments without discovering the purpose of your money. Every investment is good, and every investment is bad, depending on whether it works for you within your overall plan to achieve your goals.

"When planning for retirement, *although important*, it is **NOT about net worth and investment returns anymore …** It's all about **not running out of money** … ***and cash flow.*** You don't have time to make up for losses."

- *Bob Lawrence*

Our **proactive and comprehensive service discovers your needs to we can build the proper plan first,** just as you would if you were building a home. **A plan built on a strong foundation survives.**

Take Action and call *us toll free **1-888-892-6454** today to schedule **Step 1.***

No cost. No commitment.