



## SEVEN STAGE SYSTEM<sup>®</sup>

A fee-based planning approach that enables us to create *planning designs centered on client desires*<sup>®</sup> while providing clients a positive, memorable, and transformational financial planning experience.

### ~ *Encounter* ~

Meeting our clients for the first time

### ~ *Explore* ~

Exploring together whether we can be of help

### ~ *Discover* ~

Gathering the information needed to conduct a thorough diagnosis

### ~ *Model* ~

Facilitating the construction of a customized financial plan through our unique, interactive process

### ~ *Launch* ~

Delivering the written plan and implementing the agreed-upon strategies

### ~ *Refresh* ~

Reviewing and adjusting the plan regularly in light of an ever-changing financial landscape

### ~ *Enrich* ~

Enhancing client relationships while guiding clients toward the fulfillment of their desires



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