



## SEVEN STAGE SYSTEM®

A fee-based planning approach that enables us to create *planning designs centered on client desires*® 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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